MCH System Use Case Summary

DHS/DPH
November 11, 2011

Table of Contents

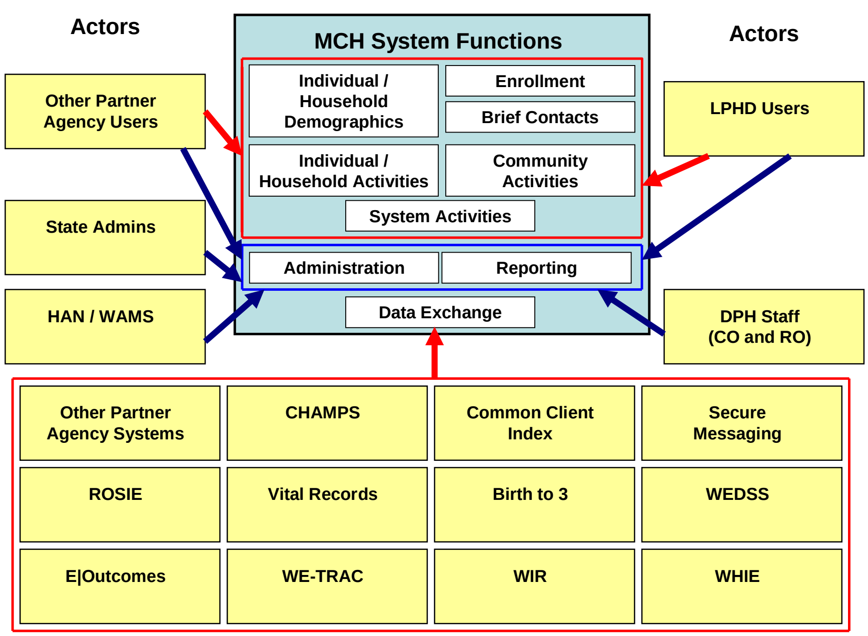
I. Introduction

The purpose of this Use Case document is to define requirements for a system to be used by the State of Wisconsin, Department of Health Services, Division of Public Health (DPH) and its partner agencies to collect and maintain client and activity data for the Maternal and Child Health (MCH) program. This system may also be used to collect and manage information that may not be covered by the Maternal and Child Health Program, such as women's health, prenatal care coordination, targeted case management, childhood blood lead screening, and other local public health services.

DPH currently uses the SPHERE data system to support its MCH program and other non-Title V programs. SPHERE, however, does not fully meet all requirements of the MCH program and all its various users in partner health organizations. To help better define those requirements, this Use Case document was initially developed through a series of meetings with the following attendees:

Susan Kratz, SPHERE Administrator
Michelle Gainey, SPHERE Business Automation Specialist
Guy Peyrot, Senior SPHERE Developer
Ken Funck, PHIN IT Supervisor

Use Cases were developed through a collaborative process that involved defining broad groupings of system functions—represented in this document as "Functional Areas"—and drilling down into those functions to define discrete use cases (listed in Section III). Individuals or other entities that interact with these functions were identified and defined as Actors (listed in Section II). The following diagram describes the relationship between Actors and Functional Areas:



As part of the Use Case development process, the importance of each use case to the ability of DPH to meet its core MCH business requirements was prioritized using the following scale:

1 – Essential
2 – High
3 – Moderate
4 – Low

Use Cases defined as “Essential” are core functions that the system must meet in order to fulfill the most important business functions of the MCH program. Those rated as High, Moderate, or Low are not absolutely essential to fulfill core business functions, but are rated in descending order of their importance to system end-users.

Use Cases also list the frequency with which that function tends to be used, using the following scale:

1 – Very Frequent
2 – Frequent
3 – Infrequent
4 – Occasional

Use Cases listed as “Very Frequent” would be used my many users each day, whereas those listed as “Occasional” might be used by a small set of users only a few times per month, or less.

To help identify how well the current system meets the requirements of the MCH program, each Use Case lists how much of that requirement is currently met by the SPHERE system, and an appendix was created to define the data elements currently collected in SPHERE for each functional area to further define the scope of each function.

Detailed requirements for the MCH system exist in the Use Cases themselves, but a high-level summary of each function can be found below.

Individual/Household Demographics functionality includes the ability to:

- Store and update numerous demographic and health-related fields pertaining to MCH clients and clients of other non-Title V programs, including the collection of insurance and provider information
- Allow for the migration of demographic data from a birth record interface
- Manage relationship data between individuals in a household, including individual clients who are in multiple households
- Collect household income and calculate poverty level to determine program eligibility

The Individual/Household Demographics function comprises 4 Use Cases, of which 3 are considered Essential.

Individual/Household Activities functionality includes the ability to:
- Store and update information pertaining to individual client activities
- Easily assign activities to multiple individuals in a household at the same time
- Easily create new activities by cloning previously-entered activities
- Ensure that activities are not assigned to individuals whose age, gender, etc. is not compatible with the activity
- Assign activities to one or more pre-defined program objective to facilitate objective reporting
- Allow for the import of activities from other systems through a data exchange

The Individual/Household Activities function comprises 2 Use Cases, of which 1 is considered Essential.

Community Activities functionality includes the ability to:
- Store and update information pertaining to community activities, i.e., activities performed by an agency that are not assigned to specific individuals/households
- Easily create new community activities by cloning previously-entered community activities

The Community Activities function comprises 1 Use Case, which is considered Essential.

System Activities functionality includes the ability to:
- Store and update information pertaining to system activities, i.e., activities performed by an agency that are not assigned to specific individuals/households or communities
- Easily create new system activities by cloning previously-entered system activities

The System Activities function comprises 1 Use Case, which is considered Essential.

Enrollment functionality includes the ability to:
- Enroll individuals in and discharge individuals from MCH and other non-Title V programs
- Enroll individuals in multiple contemporaneous programs
- Identify demographic characteristics of enrollee during program enrollment
- Identify activities that occurred during an instance of program enrollment

The Enrollment function comprises 2 Use Cases, both of which have a priority of High.

Brief Contact functionality includes the ability to:

- Store and update information pertaining to brief contacts, i.e., interaction with individuals who may or may not become clients
- Easily convert individuals with brief contacts into clients

The Brief Contact function comprises 1 Use Case, which is considered Essential.

Administration functionality includes the ability to:
- Manage role-based security for users, assigning functionality based on user role and access to data based on user role and user jurisdiction
- Allow a single user to have differing roles in differing jurisdictions, e.g., allowing access to certain functionality for clients/activities in one jurisdiction but not another
- Manage user organization structure, including the creation of new organizations, deletion of old ones, and management of local lookup codes
- Ensure system users have agreed to security and confidentiality policies via electronic signature
- Allow for delegated system administration, e.g., allowing local security officers to manage system access for their users
- Create and manage annual program objectives to which activities can be assigned and for which funding can be defined
- Manage processes to allow the granting of access to client or activity data to predecessor or successor jurisdictions
- Merge clients that have been created more than once
- Separate clients that have been erroneously merged
- Delete erroneously entered activities and clients
- Create system messages and/or broadcast e-mails

The Administration function comprises 17 Use Cases, of which 8 are considered Essential.

Data Exchange functionality includes the ability to:
- Accept demographic and/or activity information from other, non-MCH systems as appropriate using either batch or real-time interfaces
- Pass demographic and/or activity information to other, non-MCH systems as appropriate using either batch or real-time interfaces
- Interface with a Common Client Index to identify MCH clients that also exist in other DPH systems

The Data Exchange function comprises 11 Use Cases, of which 3 are considered Essential.

Reporting functionality includes the ability to:
- Create client and activity reports using a prompted interface based on date ranges, programs, location, and other criteria
- Automatically filter report output based on user role and/or user jurisdiction
- Present reports in multiple output formats, e.g., HTML, PDF, RTF, CSV
- Allow drill-down from summary reports to detail reports

The Reporting function comprises 26 Use Cases, of which 11 are considered Essential.

II. MCH System Actors

Actor	Description
LPHD Users	Users in Local Public Health Departments, with various roles.
Other Partner Agency Users	Users in other partner agencies, including Tribal Agencies, with various roles.
DPH Staff (Central and Regional Office)	Users in the Division of Public Health, both Central and Regional Office staff.
State Admins	DPH Administrators of the MCH System
Vital Records	State Vital Records System
Common Client Index	System matching individuals by common identifiers between systems.
e|Outcomes	e|Outcomes System
HAN/WAMS	HAN/WAMS user authentication systems.
ROSIE	ROSIE system containing WIC clients/activities.
WEDSS	Wisconsin Electronic Disease Surveillance System
WE-TRAC	Wisconsin Early Hearing Detection and Intervention Tracking Referral and Coordination
WIR	Wisconsin Immunization Registry
CHAMPS	Partner case management system used in parts of western Wisconsin.
Other Partner Agency Systems	Other partner case management systems.
Secure Messaging Process	Process to securely pass data between DPH systems (e.g., PHINMS)

III. MCH System Use Case Listing

Number	Functional Area	Use Case Name
DEMO001	Indiv/HH Demographics	Enter/Update Client Demographics
DEMO002	Indiv/HH Demographics	Enter/Update Household Information
DEMO003	Indiv/HH Demographics	Convert Birth Record To Client Demographics
DEMO004	Indiv/HH Demographics	Manage Household Membership
ENRL001	Indiv/HH Enrollment	Enroll Individual In Program
ENRL002	Indiv/HH Enrollment	Discharge Individual From Program
ACTI001	Indiv/HH Activities	Enter/Update Client Activity
ACTI002	Indiv/HH Activities	Retrieve Client Activity From Other System
ACTC001	Community Activities	Enter/Update Community Activity
ACTS001	System Activities	Enter/Update System Activity
BRFC001	Brief Contacts	Enter Brief Contact
ADMN001	Administration	Manage Program Objectives
ADMN002	Administration	Provide System Access to New User
ADMN003	Administration	Grant Birth Record View Access to Different Jurisdiction
ADMN004	Administration	Manually Assign Jurisdiction To Unassigned Birth Record
ADMN005	Administration	Transfer Birth Record To Different Jurisdiction
ADMN006	Administration	Merge Clients
ADMN007	Administration	Separate Previously Merged Clients
ADMN008	Administration	Grant View Of Activity Records To Other Jurisdictions
ADMN009	Administration	Transfer Activity To Another Client
ADMN010	Administration	Delete Activity
ADMN011	Administration	Delete Client
ADMN012	Administration	Add/Change Local Lookup Codes
ADMN013	Administration	Update System Communication Screens
ADMN014	Administration	Modify Organization Structure
ADMN015	Administration	Generate Broadcast E-Mail
ADMN016	Administration	Request View of Activity Records From Other Jurisdictions
ADMN017	Administration	Request Birth Record View Access from Different Jurisdiction
DTEX001	Data Exchange	Transfer Birth Records From Vital Records To MCH System
DTEX002	Data Exchange	Upload e|Outcomes Screening Activities
DTEX003	Data Exchange	Download Clients For e|Outcomes
DTEX004	Data Exchange	Send WIC Activities To MCH System
DTEX005	Data Exchange	Send Hearing Data From WE-TRAC to MCH System For Follow-Up
DTEX006	Data Exchange	Send Status of Hearing Follow-up From MCH System To WE-TRAC
DTEX007	Data Exchange	Send Lead and STI Data from WEDSS to MCH System
DTEX008	Data Exchange	Send Lead and STI Data from MCH System to WEDSS
DTEX009	Data Exchange	Retrieved Immunization Status And Lead Tests From WIR
DTEX010	Data Exchange	Send Client Data From Partner Agency To MCH System
DTEX011	Data Exchange	Send Client Data From MCH System To Partner Agency System
REPT001	Reporting	Run Client Demographics Reports
REPT002	Reporting	Run Household Activity Reports
REPT003	Reporting	Run Individual Activity Reports

Number	Functional Area	Use Case Name (cont'd)
REPT004	Reporting	Run Community Activity Reports
REPT005	Reporting	Run System Activity Reports
REPT006	Reporting	Run Brief Contact Reports
REPT007	Reporting	Run Program Enrollment Reports
REPT008	Reporting	Run Client Screening Eligibility Reports
REPT009	Reporting	Run Formal/Informal Supports Reports
REPT010	Reporting	Run Program Objective Reports
REPT011	Reporting	Run Client Profile Detail Reports
REPT012	Reporting	Run Billing Reports
REPT013	Reporting	Run Risk Factor Reports
REPT014	Reporting	Run Title V Reports
REPT015	Reporting	Run Time Reporting Reports
REPT016	Reporting	Create Mailing Labels
REPT017	Reporting	Run Birth Record Reports
REPT018	Reporting	Run e|Outcomes Processing Reports
REPT019	Reporting	Run Data Exchange Audit Reports
REPT020	Reporting	Run Partner System Data Exchange Audit Reports
REPT021	Reporting	Run Ad Hoc Reports
REPT022	Reporting	Run Data Correction QA Reports
REPT023	Reporting	Run System Audit Reports
REPT024	Reporting	Run Data Export Audit Reports
REPT025	Reporting	Run Users And Roles Reports
REPT026	Reporting	Run Activity Detail Report
REPT027	Reporting	Run Activity Notes Report

IV. MCH System Use Cases

DEMO001 – Enter/Update Client Demographics

Use Case ID:	DEMO001		
Use Case Name:	Enter/Update Client Demographics		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users Common Client Index
Description:	View, enter or update client demographics, health care coverage, health needs, contact information and significant contacts.
Trigger:	Information or referral received or identification of high risk individual from birth record.
Preconditions:	1. Client was determined to need services. 2. Client information available via client interview or referral document.
Postconditions:	1. Required client data has been captured. 2. Common Client Index (CCI) updated as necessary.
Normal Flow:	1. Search system to determine if client already exists. 2. If client exists, update as needed, else add new client record. 3. Enter/update contact information (home address/mailing address/email/phone.) 4. Enter/update health care coverage information. 5. Enter/update health needs information 6. Enter/update significant contacts. 7. Enter/update general/mortality information. 8. Enter/Update Client Resources information.
Alternative Flows:	1. Creating client from birth record will pre-populate demographic information from birth record. 2. Creating client from brief contact will pre-populate demographic information from brief contact. 3. If primary household member address already exists, address may be copied to new client.
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	1 – Very Frequent
Business Rules:	1. Search function should include Common Client Index including Soundex capabilities. 2. System should prompt user to verify health care coverage and contact information at preset intervals for active clients. 3. All MCH required demographics must be collected before activities can be entered.
Special/Security	Health care, health needs and significant contacts are

Requirements:	organization specific and can only be viewed by members of the organization that entered them.
Currently Performed by SHERE?	All performed by SPHERE except for CCI lookup, alternative flows #1 & #2, and Soundex search.
Notes and Issues:	Required Client Demographic Data Elements are listed in Appendix A. Includes assessment of formal and informal supports.

DEMO002 – Enter/Update Household Information

Use Case ID:	DEMO002		
Use Case Name:	Enter/Update Household Information		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users
Description:	View, enter or update household size, income, type and address.
Trigger:	A new client has been created or new household information has been reported.
Preconditions:	At least one household member exists as a client in the system.
Postconditions:	Household information has been captured.
Normal Flow:	1. Identify household to update from client search results. 2. Edit and update household information. 3. Copy primary's mailing and/or home address to other household members as desired.
Alternative Flows:	If household income is available, calculate poverty level and indicate programs for which household qualifies.
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	3 – Infrequent
Business Rules:	System must calculate poverty levels based on yearly level. Income history must be retained. System must retain history of household membership.
Special/Security Requirements:	None.
Currently Performed by SHERE?	Yes.
Notes and Issues:	Not all household members used for poverty level calculation are clients in the system. Required Household Data Elements are listed in Appendix B.

DEMO003 – Convert Birth Record to Client Demographics

Use Case ID:	DEMO003		
Use Case Name:	Convert Birth Record To Client Demographics		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users (Tribes Only)
Description:	Import birth records from Vital Records data to new or existing client record for children of existing clients or births identified as needing services, and create/update mother's record as required.
Trigger:	Received birth record of child of existing client or received birth record that meets health department service criteria.
Preconditions:	Birth record exists in system.
Postconditions:	Birth record information has been imported to new or existing client demographics record.
Normal Flow:	1. Worker made aware of new birth record. 2. Worker determines if mother is a client or mother/child needs services. 3. If mother or child already exists as client, allow user to compare data elements and decide which data elements should be updated based on which data is deemed to be better. 4. If mother or child does not already exist as client, create new client record and import demographic information from birth record.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	3 – Moderate
Frequency of Use:	4 – Occasional
Business Rules:	Must be done within a year of child DOB (birth records are automatically de-identified after one year).
Special/Security Requirements:	1. Can only import a birth record to user's jurisdiction. 2. User must have permission to view birth records. 3. Birth record audit record viewable by State Registrar/State Administrators is created.
Currently Performed by SHERE?	No.
Notes and Issues:	A frequent report or alert identifying non-converted birth records approaching de-identification would be beneficial.

DEMO004 – Manage Household Membership

Use Case ID:	DEMO004		
Use Case Name:	Manage Household Membership		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users
Description:	Household members are added, removed, moved between households or split off into new households.
Trigger:	Household membership is established or needs to be changed.
Preconditions:	Household must already exist in the system.
Postconditions:	Household memberships have been modified. Activities now may be associated with new household members.
Normal Flow:	1. Identify household to modify from current client record. 2. If adding a new client, enter new client as defined in DEMO001. 3. If moving an existing client to household, perform client search and add selected client to household. 4. If splitting client off into new household, create new household for that client. 5. If removing multi-household client from one household, remove association from that household.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	3 – Infrequent
Business Rules:	1. Primary household member must be identified for the purpose of defining household member relationships. 2. Clients must be assigned to at least one household but may be assigned to multiple households. 3. History of household relationships must be maintained.
Special/Security Requirements:	None.
Currently Performed by SHERE?	Yes, except SPHERE does not presently allow clients to be members of more than one household (e.g., joint custody.)
Notes and Issues:	Required Household Data Elements are listed in Appendix B.

ENRL001 – Enroll Individual In Program

Use Case ID:	ENRL001		
Use Case Name:	Enroll Individual In Program		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users (Tribes Only)
Description:	View, enter or change individual program enrollment information.
Trigger:	Individual qualifies for a program and will be receiving services.
Preconditions:	1. Client must exist in system. 2. Enrollment category must exist in system.
Postconditions:	1. Client enrolled in system.
Normal Flow:	1. Search for client to enroll. 2. Select enrollment category. 3. Select enrollment detail, if desired. 4. Enter enrollment date, assessed date, whether client is pregnant at time of enrollment, expected due date if valid, and other data required by program. 5. Enter services being received at time of enrollment. 6. Select all household members who are co-enrolled.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	1 – Very Frequent
Business Rules:	Enrollment category (state defined) is required, whereas enrollment detail (locally defined) is optional. Where possible, system should prevent enrollment of individuals in programs for which they are not qualified based on other data within the system.
Special/Security Requirements:	
Currently Performed by SHERE?	Yes.
Notes and Issues:	Required Program Enrollment Data Elements are listed in Appendix C.

ENRL002 – Discharge Individual From Program

Use Case ID:	ENRL002		
Use Case Name:	Discharge Individual From Program		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users
Description:	Discharge client from program enrollment.
Trigger:	Individual to be discharged from program enrollment.
Preconditions:	Client is enrolled in a program.
Postconditions:	Client is no longer enrolled in that program.
Normal Flow:	1. Search for client to discharge. 2. Select existing enrollment record from which to discharge client. 3. Select co-enrollees to discharge. 4. Enter discharge date and reason. 5. Update enrollment status to “discharged”.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	1 – Very Frequent
Business Rules:	
Special/Security Requirements:	
Currently Performed by SHERE?	Yes
Notes and Issues:	

ACTI001 – Enter/Update Client Activity

Use Case ID:	ACTI001		
Use Case Name:	Enter/Update Client Activity		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	Other Partner Agency Users LPHD Users
Description:	View, enter or update client activity information.
Trigger:	An activity has occurred.
Preconditions:	1. Client must exist in the system. 2. All MCH required demographics must be collected before activities can be entered for the selected client(s).
Postconditions:	1. A new activity has been entered/an existing activity has been updated. 2. New activity will be displayed on activity summary screen.
Normal Flow:	1. Search for client in system. 2. If updating existing activity, select activity to update. 3. If applicable, associate activity with one or more objectives. Users will only see objectives that are appropriate to their agency. 4. Enter/update activity information. 5. Select other household members to which activity should be applied if applicable. 6. Save activity entry.
Alternative Flows:	If copying existing activity: 1. Search for client in system. 2. Select existing activity summary to copy. 3. Perform steps 3-6 above.
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	1 – Very Frequent
Business Rules:	1. Activities move with individuals as they change households. 2. Date of birth of selected participant(s) cannot be later than date of activity. 3. Age and gender of participant(s) must be compatible with activity detail (subinterventions.) 4. Only household members eligible to be associated with the activity will be displayed for selection per #3 above. 5. All activity detail screens must be able to be displayed in a standard print-friendly format, including activity summary information, and a signature and date box at the bottom (see REPT027). All activity summary screens must include a link to the Activity Notes Report (see REPT028).
Special/Security Requirements:	1. Activity may only be viewed by the agency that entered it, based on role-based security.

	2. User role determines which subinterventions may be associated with an activity. 3. User role determines which activities a user may view/edit. HIPAA regulations may limit editing to the user who entered the activity. 4. User must be allowed to enter partial information and return to finish later. 5. System must remind user that entries that are incomplete/in progress need completion.
Currently Performed by SHERE?	Yes, except SPHERE does not copy activity summary information; copying of activity detail information is limited to a small number of subinterventions.
Notes and Issues:	It would be beneficial if, in addition to activity notes, supporting documents could be attached to activities and be stored in the system. Required Activity Data Elements are listed in Appendix E.

ACTI002 – Retrieve Client Activity From Other System

Use Case ID:	ACTI002		
Use Case Name:	Retrieve Client Activity From Other System		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users Common Client Index
Description:	Retrieve activity from affiliated system into MCH System.
Trigger:	User is aware that a similar or identical activity exists in an affiliated system.
Preconditions:	1. Client exists in system 2. Activity exists in affiliated system.
Postconditions:	1. Activity has been imported into system.
Normal Flow:	1. Search for and select client. 2. Search for activity in affiliated system. 3. Retrieve activity data. 4. Edit activity data as necessary. 5. Select additional household members to associate with activity (if applicable.) 6. Save activity entry in system.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	3 – Moderate
Frequency of Use:	2 – Frequent
Business Rules:	Must be able to use Common Client Index to identify client as same person in both systems.
Special/Security Requirements:	Role based security will determine which activities may be imported.
Currently Performed by SHERE?	No.
Notes and Issues:	

ACTC001 – Enter/Update Community Activity

Use Case ID:	ACTC001		
Use Case Name:	Enter/Update Community Activity		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	Other Partner Agency Users LPHD Users
Description:	View, enter or update community activity.
Trigger:	Community activity occurred.
Preconditions:	None.
Postconditions:	1. A new community activity has been entered/an existing community activity has been updated. 2. New community activity will be displayed on community activity summary screen.
Normal Flow:	1. If updating existing activity, select activity to update. 2. Enter/update activity information. 3. Save activity entry.
Alternative Flows:	If copying existing activity: 1. Select activity summary to copy. 2. Perform steps 2-3 above.
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	All activity detail screens must be displayed in a standard print-friendly format, including activity summary information, and a signature and date box at the bottom (see REPT027). All activity summary screens must include a link to their commensurate Activity Notes Report (see REPT028).
Special/Security Requirements:	1. Activity may only be viewed/edited by the agency that entered it. 2. User role determines which subinterventions may be associated with an activity. 3. User role determines which activities a user may view/edit.
Currently Performed by SHERE?	Yes, except SPHERE does not currently have copying functionality.
Notes and Issues:	It would be beneficial if, in addition to activity notes, supporting documents could be attached to activities and be stored in the system. Required Activity Data Elements are listed in Appendix E.

ACTS001 – Enter/Update System Activity

Use Case ID:	ACTS001		
Use Case Name:	Enter/Update System Activity		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	Other Partner Agency Users LPHD Users
Description:	View, enter or update system activity.
Trigger:	System activity has occurred.
Preconditions:	None.
Postconditions:	1. A new system activity has been entered/an existing system activity has been updated. 2. New system activity will be displayed on system activity summary screen.
Normal Flow:	1. If updating existing activity, select activity to update. 2. Enter/update activity information. 3. Save activity entry.
Alternative Flows:	If copying existing activity: 1. Select activity summary to copy. 2. Perform steps 2-3 above.
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	All activity detail screens must be displayed in a standard print-friendly format, including activity summary information, and a signature and date box at the bottom (see REPT027). All activity summary screens must include a link to the Activity Notes Report (see REPT028).
Special/Security Requirements:	1. Activity may only be viewed/edited by the agency that entered it. 2. User role determines which subinterventions may be associated with an activity. 3. User role determines which activities a user may view/edit.
Currently Performed by SHERE?	Yes, except SPHERE does not currently have copying functionality.
Notes and Issues:	It would be beneficial if, in addition to activity notes, supporting documents could be attached to activities and be stored in the system. Required Activity Data Elements are listed in Appendix E.

BRFC001 – Enter/Update Brief Contact

Use Case ID:	BRFC001		
Use Case Name:	Enter/Update Brief Contact		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	Other Partner Agency Users LPHD Users
Description:	View, enter or update brief contact.
Trigger:	Brief contact occurred (contact may or may not be an existing client.)
Preconditions:	
Postconditions:	1. A new brief contact has been entered/an existing brief contact has been updated. 2. New brief contact will be displayed on brief contact summary screen.
Normal Flow:	1. If updating existing brief contact, select brief contact to update. 2. Enter/update brief contact information, including personal identifying information if available (name, DOB.) 3. User may run process to determine if individual is already a client in system. 4. Save brief contact entry.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	1. Brief contacts have the right to remain anonymous. 2. Brief contacts can be converted into clients (see DEMO001.)
Special/Security Requirements:	1. If sensitive information or services requested are entered then role based security will be applied. 2. Brief contact may only be viewed/edited by the agency that entered it.
Currently Performed by SHERE?	Yes, except SPHERE does not have person identifying information or role based security for brief contacts.
Notes and Issues:	Required Brief Contact Data Elements are listed in Appendix D.

ADMN001 – Manage Program Objectives

Use Case ID:	ADMN001		
Use Case Name:	Manage Program Objectives		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	State Admins
Description:	State administrators enter Program Objective information to allow for easier objective tracking and reporting. Objectives are developed by program consultants to meet identified program priorities. Local agencies agree to perform specific services in aid of these objectives. The MCH system needs to be able to track specific client/community/system services that meet these objectives. When entering activities that further an objective, users can associate that objective with the activity.
Trigger:	New Program Objective.
Preconditions:	
Postconditions:	Program Objective information entered.
Normal Flow:	1. Enter name and program of objective 2. Specify information that must be entered to meet the objective. 3. Specify agencies that will use this objective.
Alternative Flows:	1. Copy existing objective if similar objective exists. 2. Perform steps 1,2 and 3 as above.
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	4 – Occasional
Business Rules:	1. Objectives must be negotiated between agencies and program consultants. 2. When objectives are entered, default state and/or local funding source, program and service can be defined.
Special/Security Requirements:	
Currently Performed by SHERE?	No.
Notes and Issues:	Selection of Template Objective must occur at time of service entry. Objectives are defined by local and statewide agencies.

ADMN002 – Provide System Access To New User

Use Case ID:	ADMN002		
Use Case Name:	Provide System Access to New User		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins HAN/WAMS
Description:	Grant system access and roles to users.
Trigger:	New user requests access to system or existing user requests changes to roles in system.
Preconditions:	User has WAMS ID/HAN account.
Postconditions:	1. System access has been granted to user. 2. Roles have been assigned to user.
Normal Flow:	1. User clicks on link to register for system access. 2. System validates user ID and password in the HAN. 3. If user does not have WAMS ID and HAN account, user is alerted that they must have both before registering for system access. 4. User indicates which system roles they want. 5. System displays security and confidentiality policy and usage agreement. 6. User checks user agreement box indicating electronic signature. 7. System notifies appropriate administrator based on organizational affiliation of HAN account and requested roles. 8. Local/State Administrator reviews request and approves/denies access/change in roles. State Administrators must select the organization for which the user role applies. Local Administrators can only assign roles to users belonging to their organization.
Alternative Flows:	If user already has SPHERE access and is requesting new roles, the security and confidentiality policy in step #5 is not displayed.
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	
Special/Security Requirements:	1. There must be an electronic user agreement on file. 2. If user agreement is more than two years old, user will not be allowed to access system until user agreement is revalidated. 3. Requests for Local Administrator, Birth Record Export, Data Export and Ad Hoc Report Builder must be approved

	by State Administrator. 4. Requests for any roles for organizations without a Local Administrator are routed to State Administrators. 5. State Registrar must approve birth record review staff. 6. Date, time and grantor of all access and roles must be recorded. 7. Users assigned to more than one organizations must be able to have different roles for each organizations.
Currently Performed by SHERE?	Yes, except Electronic usage agreement is not currently part of SPHERE and organization-specific roles are not currently supported.
Notes and Issues:	In future, HAN may no longer be involved in account management. Electronic user agreement within system is preferred.

ADMN003 – Grant Birth Record View Access To Different Jurisdiction

Use Case ID:	ADMN003		
Use Case Name:	Grant Birth Record View Access to Different Jurisdiction		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users
Description:	Allow another jurisdiction to view a birth record.
Trigger:	Agency receives request for view access to a specific record.
Preconditions:	Birth record exists and is assigned to a jurisdiction.
Postconditions:	Birth record viewable by other jurisdiction.
Normal Flow:	1. User receives request for birth record view access. 2. User confirms that requesting jurisdiction should receive view access. 3. User provides view access.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	2 – Frequent
Business Rules:	
Special/Security Requirements:	1. Can only be performed by users with appropriate access as approved by Vital Records, possibly those listed on MOU with Vital Records and assigned to birth record review role, such as Tribal Agencies. 2. View granting operation is recorded in birth record audit logs.
Currently Performed by SHERE?	Yes.
Notes and Issues:	

ADMN004 – Manually Assign Jurisdiction To Unassigned Birth Record

Use Case ID:	ADMN004		
Use Case Name:	Manually Assign Jurisdiction to Unassigned Birth Record		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	State Admins
Description:	Manually assign correct jurisdiction to those birth records that cannot be assigned during load process.
Trigger:	Unassigned birth record alert received
Preconditions:	1. Birth record received from Vital Records 2. Batch jurisdiction assignment process run 3. Unassigned birth record alert sent to appropriate staff.
Postconditions:	Birth record assigned to appropriate jurisdiction.
Normal Flow:	1. State Admin receives notice of unassigned birth record. 2. State Admin retrieves list of unassigned birth records displaying mother's residence address. 3. State Admin manually assigns birth record to appropriate jurisdiction.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	4 – Occasional
Business Rules:	
Special/Security Requirements:	Functionality restricted to State Admins per agreement with Vital Records.
Currently Performed by SHERE?	Yes.
Notes and Issues:	

ADMN005 – Transfer Birth Record To Different Jurisdiction

Use Case ID:	ADMN005		
Use Case Name:	Transfer Birth Record to Different Jurisdiction		
Created By:		Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users
Description:	Re-assign birth record jurisdiction.
Trigger:	Birth record assigned to incorrect organization.
Preconditions:	Birth record exists and is assigned to the wrong jurisdiction.
Postconditions:	Birth record assigned to correct jurisdiction.
Normal Flow:	1. LPHD staff made aware of birth record incorrectly assigned to their jurisdiction via review of birth record listing or contact from another agency. 2. User retrieves record and assigns to correct agency.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	3 – Infrequent
Business Rules:	
Special/Security Requirements:	1. Can only be performed by users listed on MOU with Vital Records and assigned to birth record review role. 2. Transfer operation is recorded in birth record audit logs.
Currently Performed by SHERE?	Yes.
Notes and Issues:	

ADMN006 – Merge Clients

Use Case ID:	ADMN006		
Use Case Name:	Merge Clients		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins
Description:	Merge two or more client records into a single client record.
Trigger:	Potential duplicate client records with activities and/or demographic information identified.
Preconditions:	Duplicate client records exist.
Postconditions:	1. One or more client record(s) invalidated. 2. One client record correctly updated.
Normal Flow:	1. Organization that identifies the duplicate records selects the records to be merged. 2. System checks records for proprietary demographics and/or activities belonging to other organizations. 3. If no other organizations have proprietary information associated with this client, system proceeds with the merge, else only State Admin can perform merge (see Alternative Flow). 4. The record which will be the remaining primary record is clearly displayed to the user, and the user confirms this selection. 5. Persons associated with the existing household(s) are displayed for viewing and confirmation. Household members that are not confirmed will not be included in the merged client household. 6. Demographic and activity records are transferred to the remaining record.
Alternative Flows:	3. If another organization has proprietary information associated with this client, a message is displayed notifying the user that they must contact a State Admin to perform the merge. Upon notification, State Admin will review records involved to determine the organizations that have proprietary demographic and/or activities with the client(s). State Admin contacts organizations involved to obtain permission to proceed with the merge.
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	1. When searching for a merged client, original client record will still be returned by the client search feature with a note indicating the record into which they were merged as well

	as the date of the merge. 2. Merge history is maintained in system. 3. Only administrators can perform merges. 4. Local administrators can only merge clients that have proprietary demographics and activities with their organization. 5. State administrators can merge any client records in the system, with approval of the agencies involved. 6. If the record to be merged into the intended remaining record is only associated with a single agency, a local administrator from that agency can perform the merge. 7. If a merge results in duplicate activities on the remaining client record, a local security officer is responsible for deletion of extra activity records.
Special/Security Requirements:	1. Merge can only be performed by local and state administrators. 2. State administrator can only see counts of activity/demographic records for each organization; they cannot see the content of those records.
Currently Performed by SHERE?	Yes.
Notes and Issues:	

ADMN007 – Separate Previously Merged Clients

Use Case ID:	ADMN007		
Use Case Name:	Separate Previously Merged Clients		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins
Description:	Separate two previously merged client records.
Trigger:	User made aware that two previously merged clients were not the same client.
Preconditions:	1. Merged client record exists. 2. Previously invalidated duplicate client record exists.
Postconditions:	1. Previously invalidated client record made valid with activities and demographics restored. 2. Previously merged client record updated as necessary.
Normal Flow:	1. Organization that identifies the incorrectly merged record selects that record for unmerge. 2. System checks record for proprietary demographics and/or activities belonging to other organizations. 3. If no other organizations have proprietary information associated with these clients, system proceeds with the separation of previously merged clients, else only State Admin can separate previously merged clients (see Alternative Flow). 4. Transferred demographic and activity records are restored to the original client record.
Alternative Flows:	1. If another organization has proprietary information associated with either of these clients, a message is displayed notifying the user that they must contact a State Admin to separate the merged clients. Upon notification, State Admin will review records involved to determine the organizations that have proprietary demographic and/or activities with the client(s). State Admin contacts organizations involved to obtain permission to proceed with the separation of merged clients.
Exceptions:	
Includes:	
Priority:	4 – Low
Frequency of Use:	3 – Infrequent
Business Rules:	Separation of merged clients is recorded in the merge history for each client record.
Special/Security Requirements:	1. Separation of merged clients can only be performed by local and state administrators. 2. State administrator can only see counts of

	activity/demographic records for each organization; they cannot see the content of those records.
Currently Performed by SHERE?	No.
Notes and Issues:	

ADMN008 – Grant View Of Activity Records To Other Jurisdictions

Use Case ID:	ADMN008		
Use Case Name:	Grant View of Activity Records to Other Jurisdictions		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users
Description:	Allow another jurisdiction to view client's activity records from your jurisdiction.
Trigger:	Request to view specific client activity type received from other jurisdiction.
Preconditions:	1. Activity record(s) exists. 2. Request has been received.
Postconditions:	Other jurisdiction granted view-only access to the specified activity type.
Normal Flow:	1. Local Admin/Local Security Officer/Local Supervisor receives request. 2. User verifies the request. 3. If activity type can be shared, user grants view access to activity type with expiration date when appropriate. 4. System notifies requesting agency that view access has or has not been granted.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	4 – Low
Frequency of Use:	2 – Frequent
Business Rules:	1. Only activities of specific types and for specific agencies/agency types can be viewed by other jurisdictions. 2. Further review of security and confidentiality rules may result in suppression of some activity details.
Special/Security Requirements:	This function is restricted to Local administrators, local supervisors and local security officers.
Currently Performed by SHERE?	No.
Notes and Issues:	

ADMN009 – Transfer Activity To Another Client

Use Case ID:	ADMN009		
Use Case Name:	Transfer Activity to Another Client		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins
Description:	Transfer an incorrectly assigned activity to the correct client.
Trigger:	User made aware that activity has been assigned to the wrong client.
Preconditions:	1. Activity record exists associated with wrong client. 2. Appropriate client record to which the activity should be transferred exists.
Postconditions:	Activity re-assigned to correct client.
Normal Flow:	1. User searches for client and finds activity to transfer. 2. User searches for and selects correct client for the activity and transfers activity record.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	4 – Low
Frequency of Use:	3 – Infrequent
Business Rules:	
Special/Security Requirements:	Function restricted to Local Administrators, Local Security Officers and Local Supervisors.
Currently Performed by SHERE?	No.
Notes and Issues:	

ADMN010 – Delete Activity

Use Case ID:	ADMN010		
Use Case Name:	Delete Activity		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users
Description:	Delete an incorrectly entered individual, community or system activity.
Trigger:	User made aware that incorrect activity needs to be deleted.
Preconditions:	Activity record exists.
Postconditions:	Activity record deleted.
Normal Flow:	1. User selects activity for deletion. 2. User deletes activity.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	3 – Infrequent
Business Rules:	
Special/Security Requirements:	Local Security Officer is the only role that can perform this function.
Currently Performed by SHERE?	Yes
Notes and Issues:	

ADMN011 – Delete Client

Use Case ID:	ADMN011		
Use Case Name:	Delete Client		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins
Description:	Delete an incorrectly entered client.
Trigger:	User made aware that client needs to be deleted.
Preconditions:	Client record exists.
Postconditions:	Client record deleted.
Normal Flow:	1. User searches for and selects client to delete. 2. User reviews client record for demographic and activity entries. 3. System checks record for proprietary demographics and/or activities belonging to other organizations. 4. If no other organizations have proprietary information associated with this clients. 5. System proceeds with the client deletion, else only State Admin can delete client (see Alternative Flow). 6. If there are other household members and the client to be deleted is the Primary Contact for the household, another household member must be selected as the Primary Contact. 7. Client record is deleted.
Alternative Flows:	1. If another organization has proprietary information associated with this client, a message is displayed notifying the user that they must contact a State Admin to perform the deletion. Upon notification, State Admin will review records involved to determine the organizations that have proprietary demographic and/or activities with the client(s). State Admin contacts organizations involved to obtain permission to proceed with the deletion.
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	3 – Infrequent
Business Rules:	If record is a duplicate and there are demographics and/or activities that should be retained, a merge should be performed instead (see ADMN006).
Special/Security Requirements:	1. Restricted to Local Administrator, State Administrator and State Security Officer. 2. Local Admins can only delete clients who have no activities or proprietary demographics belonging to other organizations.
Currently Performed by	Yes.

SHERE?	
Notes and Issues:	

ADMN012 – Add/Change Local Lookup Codes

Use Case ID:	ADMN012		
Use Case Name:	Add/Change Local Lookup Codes		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins
Description:	Add or modify system-required lookup codes managed at the local level.
Trigger:	Lookup codes need to be changed.
Preconditions:	Lookup code field exists.
Postconditions:	Lookup code values added or updated.
Normal Flow:	1. User navigates to administration section and selects local code. 2. User is presented with a list of existing local codes. 3. To create a new code, user enters code with start date. 4. To rename an existing code, user edits code value. System displays a warning that any existing entries with this code will display the new value. 5. To change begin and end dates, user edits date fields. 6. To invalidate codes, user selects status of Inactive. System displays a warning that code can no longer be specified for new entries regardless of date.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	3 – Infrequent
Business Rules:	1. Codes should not be deleted from the system database, only inactivated, to ensure historical records still display appropriate codes. 2. Codes should be stored with begin and end dates indicating the period during which it is valid. When activities are entered, only codes valid at time of activity should be displayed. 3. Inactivated codes must still be available for reporting.
Special/Security Requirements:	
Currently Performed by SHERE?	Yes, except SPHERE does not currently use begin/end dates for codes.
Notes and Issues:	

ADMN013 – Update System Communication Screens

Use Case ID:	ADMN013		
Use Case Name:	Update System Communication Screens		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	State Admins
Description:	Enter information needed to broadcast a message users currently logged into system.
Trigger:	Message needs to be broadcast to users currently logged into system.
Preconditions:	None.
Postconditions:	Communication broadcast to system users.
Normal Flow:	1. State administrator selects and edits message template or enters message text and clicks "Send." 2. Users logged into system receive broadcast message. 3. Users acknowledge the message in order to continue.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	3 – Moderate
Frequency of Use:	4 – Occasional
Business Rules:	
Special/Security Requirements:	Function restricted to State Admins.
Currently Performed by SHERE?	No.
Notes and Issues:	

ADMN014 – Modify Organization Structure

Use Case ID:	ADMN014		
Use Case Name:	Modify Organization Structure		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	State Admins HAN/WAMS
Description:	Reassign all users, user roles, local codes, activities and birth records to a different organization.
Trigger:	State Admin made aware of need to transfer users, user roles, local codes, activities, demographics and birth records to a different organization (usually the result of an organizational merge.)
Preconditions:	Users, user roles, local codes, demographics, activities and birth records must exist in system.
Postconditions:	Users, user roles, local codes, activities, demographics and birth records have been assigned to different organization.
Normal Flow:	1. State Admins made aware of need to perform transfer. 2. State Admin selects source and target organizations for transfer. 3. Unduplicated users, user roles, local codes, demographics, activities and birth records are assigned to target organization. 4. System generates report of count of individual, community and system activities, demographics and brief contacts transferred by the operation.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	3 – Moderate
Frequency of Use:	4 – Occasional
Business Rules:	State Admin should run before and after reports to ensure transfer functioned correctly.
Special/Security Requirements:	
Currently Performed by SHERE?	No.
Notes and Issues:	e|Outcomes portable device synchronization can result in activities being created for old organization.

ADMN015 – Generate Broadcast E-mail

Use Case ID:	ADMN015		
Use Case Name:	Generate Broadcast E-mail		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins HAN/WAMS
Description:	Generate e-mail to known users or clients.
Trigger:	Informational e-mail required.
Preconditions:	E-mail addresses stored.
Postconditions:	E-mail sent to appropriate addresses.
Normal Flow:	1. User selects e-mail recipient group by jurisdiction, program, activity, individual name, or other criteria. 2. User enters e-mail subject and body. 3. Broadcast e-mail is generated.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	Recipient lists should be unduplicated.
Special/Security Requirements:	Only certain designees in a given jurisdiction should be allowed to generate broadcast e-mails.
Currently Performed by SHERE?	No
Notes and Issues:	

ADMN016 – Request View of Activity Records From Other Jurisdictions

Use Case ID:	ADMN016		
Use Case Name:	Request View of Activity Records from other Jurisdictions		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users
Description:	Request view of client's activity records from a different jurisdiction.
Trigger:	User made aware that other jurisdictions have provided shareable services.
Preconditions:	Activity record(s) exists.
Postconditions:	Activity view request is sent to appropriate jurisdiction.
Normal Flow:	1. User navigates to Other Organization Activity Screen which lists all organizations that have provided shareable activities. 2. User clicks link to request access to specified organization and activity type.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	4 – Low
Frequency of Use:	2 – Frequent
Business Rules:	1. Only activities of specific types and for specific agencies/agency types are shareable and will be made visible on the Other Organization Activity Screen. 2. Further review of security and confidentiality rules may result in suppression of some activity details. 3. User may specify the length of time for which the access is requested.
Special/Security Requirements:	Categories the user may request will be restricted by the user's roles (e.g., user must have PNCC rights to see PNCC activities listed on the Other Organization Activity Screen.)
Currently Performed by SHERE?	No.
Notes and Issues:	

ADMN017 – Request Birth Record View Access From Different Jurisdiction

Use Case ID:	ADMN017		
Use Case Name:	Request Birth Record View Access From Different Jurisdiction		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users
Description:	Request ability to view birth record from other jurisdiction.
Trigger:	User needs information from a birth record belonging to another organization.
Preconditions:	Birth record exists and is assigned to another jurisdiction.
Postconditions:	Request for view access sent.
Normal Flow:	1. User goes to birth record search screen to determine which jurisdiction currently owns birth record. 2. User clicks on link to request view access for specified record.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	2 – Frequent
Business Rules:	
Special/Security Requirements:	Can only be performed by users with appropriate access as approved by Vital Records, possibly those listed on MOU with Vital Records and assigned to birth record review role.
Currently Performed by SHERE?	No.
Notes and Issues:	

DTEX001 – Transfer Birth Records From Vital Records To MCH System

Use Case ID:	DTEX001		
Use Case Name:	Transfer Birth Records From Vital Records To MCH System		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	Vital Records Secure Messaging Process
Description:	New birth records are passed from the Vital Records System via a secure messaging process, assigned to a jurisdiction, and stored in the database
Trigger:	New birth records available.
Preconditions:	
Postconditions:	Birth records have assigned jurisdictions and are loaded into the database.
Normal Flow:	1. Vital Records places daily birth record data in a secure location. 2. Secure messaging system passes data to system staging area. 3. Address of mother's residence is used to assign jurisdiction via municipality and county. 4. Birth data is loaded into database.
Alternative Flows:	
Exceptions:	If jurisdiction cannot be assigned, a prompt is created to ensure jurisdictions can be manually assigned.
Includes:	
Priority:	1 – Essential
Frequency of Use:	1 – Very Frequent
Business Rules:	Jurisdiction is assigned by first looking for specific jurisdiction records for that municipality. If there is not a specific jurisdiction for that municipality, the jurisdiction for that county is assigned.
Special/Security Requirements:	Birth data is loaded into its own database tables; other functions may copy it to individual or activity tables.
Currently Performed by SHERE?	Yes, except SPHERE currently lacks the ability to create clients from birth records.
Notes and Issues:	Occasionally, incorrect addresses lead to incorrect jurisdiction assignment. A process must exist to transfer birth records to different jurisdictions.

DTEX002 – Upload e|Outcomes Screening Activities

Use Case ID:	DTEX002		
Use Case Name:	Upload e|Outcomes Screening Activities		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	e|Outcomes
Description:	Screening activities for e|Outcomes clients are loaded from e|Outcomes portable devices into the MCH system.
Trigger:	Screening performed and user synchronizes with system.
Preconditions:	Client being screened has been downloaded to e|Outcomes portable device.
Postconditions:	Screening activities have been loaded into the MCH system.
Normal Flow:	1. e|Outcomes staff perform screenings. 2. User returns to office and synchronizes portable device with system. 3. Screenings are loaded as individual activities in the MCH system. 4. System generates messages indicating success or failure of upload process.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	
Special/Security Requirements:	None
Currently Performed by SHERE?	Yes.
Notes and Issues:	Failed uploads will require some sort of manual intervention.

DTEX003 – Download Clients for e|Outcomes

Use Case ID:	DTEX003		
Use Case Name:	Download Clients for e|Outcomes		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	e|Outcomes
Description:	Individual information for e|Outcomes clients is downloaded from the MCH system to portable devices.
Trigger:	Staff ready to download e|Outcomes client information.
Preconditions:	Client must be actively enrolled in Home Visiting program.
Postconditions:	All clients enrolled in Home Visiting for user's jurisdiction are downloaded to the portable device.
Normal Flow:	1. User synchronizes portable device with system. 2. Download is performed. 3. System provides verification that download has occurred successfully.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	
Special/Security Requirements:	
Currently Performed by SHERE?	Yes.
Notes and Issues:	

DTEX004 – Send WIC Activities to MCH System

Use Case ID:	DTEX004		
Use Case Name:	Send WIC Activities to MCH System		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	ROSIE Common Client Index Secure Messaging Process
Description:	Appropriate activities recorded in ROSIE for individuals also receiving related services tracked in MCH system are sent to MCH system.
Trigger:	Activities recorded in ROSIE for individuals also tracked in MCH.
Preconditions:	1. Client exists in both ROSIE and MCH System. 2. New activities exist in ROSIE which are not found in MCH System.
Postconditions:	Activities sent to MCH system and stored as individual activities.
Normal Flow:	1. ROSIE system calls Common Client Index to identify individuals active in both ROSIE and MCH System. 2. ROSIE sends new activities to MCH System. 3. MCH System loads appropriate activities for clients enrolled in related MCH services.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	2 – Frequent
Business Rules:	Only WIC activities of a type that pertain to services received from MCH by a particular client will be loaded into MCH system.
Special/Security Requirements:	Access to WIC data in SPHERE must follow WIC security guidelines.
Currently Performed by SHERE?	No.
Notes and Issues:	All data exchanges may be initiated by system or partner system and may involve real-time or batch transfer.

DTEX005 – Send Hearing Data From WE-TRAC to MCH System For Follow-Up

Use Case ID:	DTEX005		
Use Case Name:	Send Hearing Data From WE-TRAC to MCH System For Follow-Up		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	WE-TRAC Common Client Index Secure Messaging Process
Description:	Failed or missing hearing tests requiring follow-up are sent from WE-TRAC to MCH System.
Trigger:	WE-TRAC made aware of newborn requiring follow-up or newborn with no hearing test performed (blood card with no results.)
Preconditions:	Blood card indicating failed or missing hearing test is loaded into WE-TRAC.
Postconditions:	Hearing test information stored in MCH System.
Normal Flow:	1. WE-TRAC calls Common Client Index to identify individuals active in both WE-TRAC and MCH System. 2. WE-TRAC sends new hearing tests requiring follow-up to MCH System. 3. MCH System loads hearing test information.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	4 – Low
Frequency of Use:	4 – Occasional
Business Rules:	
Special/Security Requirements:	
Currently Performed by SHERE?	No.
Notes and Issues:	All data exchanges may be initiated by system or partner system and may involve real-time or batch transfer.

DTEX006 – Send Status Of Hearing Follow-Up From MCH System To WE-TRAC

Use Case ID:	DTEX006		
Use Case Name:	Send Status of Hearing Follow-up From MCH System To WE-TRAC		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	WE-TRAC Common Client Index Secure Messaging Process
Description:	Hearing test follow-up information is sent from MCH System to WE-TRAC.
Trigger:	Hearing test follow-up has been performed.
Preconditions:	1. Client exists in both WE-TRAC and MCH System. 2. Hearing test follow-up information has been entered.
Postconditions:	Hearing test follow-up information passed to WE-TRAC.
Normal Flow:	1. Hearing test follow up performed. 2. User selects follow up for transmission to WE-TRAC. 3. Secure messaging process passes follow up results to WE-TRAC.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	4 – Low
Frequency of Use:	4 – Occasional
Business Rules:	
Special/Security Requirements:	
Currently Performed by SHERE?	No.
Notes and Issues:	All data exchanges may be initiated by system or partner system and may involve real-time or batch transfer. If Common Client Index is not available, client index between WE-TRAC and MCH System would need to exist in one or both systems.

DTEX007 – Send Lead and STI Data From WEDSS To MCH System

Use Case ID:	DTEX007		
Use Case Name:	Send Lead and STI Data from WEDSS to MCH System		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	WEDSS Common Client Index Secure Messaging Process
Description:	Lead and/or STI activities are sent from WEDSS to MCH System.
Trigger:	New lead and or STI activities entered in WEDSS.
Preconditions:	1. Client exists in both WEDSS and MCH System. 2. New lead and/or STI activities have been entered in WEDSS.
Postconditions:	Lead and/or STI activities have been loaded into MCH System.
Normal Flow:	1. WEDSS queries Common Client Index to identify clients in both WEDSS and MCH System. 2. New Lead and/or STI activities for these clients are passed to MCH System.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	3 – Moderate
Frequency of Use:	2 – Frequent
Business Rules:	
Special/Security Requirements:	Access to WEDSS data in SPHERE must follow WEDSS security guidelines.
Currently Performed by SHERE?	No.
Notes and Issues:	All data exchanges may be initiated by system or partner system and may involve real-time or batch transfer.

DTEX008 – Send Lead and STI Data From MCH System To WEDSS

Use Case ID:	DTEX008		
Use Case Name:	Send Lead and STI Data from MCH System to WEDSS		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	WEDSS Common Client Index Secure Messaging Process
Description:	Lead and/or STI activities are sent from MCH System to WEDSS.
Trigger:	New lead and or STI activities entered in MCH System.
Preconditions:	1. Client exists in both WEDSS and MCH System. 2. New lead and/or STI activities have been entered in MCH System.
Postconditions:	Lead and/or STI activities have been passed to WEDSS.
Normal Flow:	1. MCH System Batch Scheduler initiates process to query Common Client Index to identify clients in both WEDSS and MCH System. 2. Any new Lead and/or STI activities for those clients are passed to WEDSS.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	3 – Moderate
Frequency of Use:	2 – Frequent
Business Rules:	
Special/Security Requirements:	
Currently Performed by SHERE?	No.
Notes and Issues:	All data exchanges may be initiated by system or partner system and may involve real-time or batch transfer. If Common Client Index is not available, client index between WEDSS and MCH System would need to exist in one or both systems.

DTEX009 –Retrieve Immunization Status and Lead Tests From WIR

Use Case ID:	DTEX009		
Use Case Name:	Retrieves Immunization Status and Lead Tests From WIR		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	WIR Common Client Index Secure Messaging Process
Description:	Changes in immunization status of MCH clients and Lead Tests are received from WIR.
Trigger:	Changes in immunization status are entered in WIR.
Preconditions:	1. Client exists in both WIR and MCH System. 2. Changes in immunization status have been entered in WIR and/or new lead results have been entered in WIR.
Postconditions:	Changes in immunization status and/or lead test results have been passed to MCH System.
Normal Flow:	1. MCH System queries Common Client Index to identify clients in both WIR and MCH System. 2. Any changes in immunization status and/or new lead test results for those clients are passed to MCH System.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	3 – Moderate
Frequency of Use:	2 – Frequent
Business Rules:	MCH System does not require details of all immunizations, only changes in immunization status.
Special/Security Requirements:	
Currently Performed by SHERE?	No.
Notes and Issues:	All data exchanges may be initiated by system or partner system and may involve real-time or batch transfer.

DTEX010 – Send Client Data From Partner Agency System to MCH System

Use Case ID:	DTEX010		
Use Case Name:	Send Client Data From Partner Agency System To MCH System		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users, including Tribal Agencies CHAMPS Other Partner Agency Systems Secure Messaging Process
Description:	Agencies that use other systems (e.g., CHAMPS) for case management send client demographic and activity information to the MCH System.
Trigger:	Client demographic or activity data is added or changed in partner system.
Preconditions:	1. Client exists in partner agency system, and may exist in MCH System. 2. Changed or added demographic or activity information exists in partner agency system.
Postconditions:	Changed or added demographic or activity information has been passed to MCH system.
Normal Flow:	1. User enters information for client in partner agency system. 2. Information is passed to MCH System via secure messaging process.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	2 – Frequent
Business Rules:	
Special/Security Requirements:	
Currently Performed by SHERE?	No.
Notes and Issues:	Individual interfaces may need to be developed for each partner system.

DTEX011 – Send Client Data From MCH System To Partner Agency System

Use Case ID:	DTEX011		
Use Case Name:	Send Client Data From MCH System To Partner Agency System		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users, including Tribal Agencies. CHAMPS Other Partner Agency Systems Secure Messaging Process
Description:	Agencies that use the MCH system for case management but need to share data with other required internal systems (e.g., tribal systems) pass client demographic and activity information entered in the MCH System to their internal system.
Trigger:	Client demographic data is added or changed in MCH System.
Preconditions:	1. Client exists in MCH System, and may exist in partner agency system. 2. Changed or added demographic or activity information exists in MCH system.
Postconditions:	Changed or added demographic information has been passed to partner agency system.
Normal Flow:	1. User enters demographic or activity information for client in MCH System 2. Information is passed to MCH System via secure messaging process.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	2 – Frequent
Business Rules:	
Special/Security Requirements:	
Currently Performed by SHERE?	No.
Notes and Issues:	Individual interfaces may need to be developed for each partner system.

REPT001 – Run Client Demographic Reports

Use Case ID:	REPT001		
Use Case Name:	Run Client Demographic Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs client demographic reports.
Trigger:	User requires summary or detail of client demographic information.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, funding, location) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed. 5. If summary report is in HTML, user with appropriate role may drill down to detail information.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	1. Client listing reports are available only to users with LOA and LPHS roles. 2. Client summaries and listings are available only for user's jurisdiction. 3. State staff can run reports for multiple jurisdictions.
Currently Performed by SHERE?	Yes. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	Demographics should include information on pregnancy dates and mothers of children in certain age groups.

REPT002 – Run Household Activity Reports

Use Case ID:	REPT002		
Use Case Name:	Run Household Activity Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs household activity reports.
Trigger:	User requires summary or detail of household activities.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, funding, location) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed. 5. If summary report is in HTML, user with appropriate role may drill down to detail information.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	1. Client listing reports are available only to users with LOA and LPHS roles. 2. Client summaries and listings are available only for user's jurisdiction. 3. State staff can run reports for multiple jurisdictions.
Currently Performed by SHERE?	Yes. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	

REPT003 – Run Individual Activity Reports

Use Case ID:	REPT003		
Use Case Name:	Run Individual Activity Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs individual activity reports.
Trigger:	User requires summary or detail of individual activities.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, funding, location) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed. 5. If summary report is in HTML, user with appropriate role may drill down to detail information.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	1. Client listing reports are available only to users with LOA and LPHS roles. 2. Client summaries and listings are available only for user's jurisdiction. 3. State staff can run reports for multiple jurisdictions.
Currently Performed by SHERE?	Yes. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	

REPT004 – Run Community Activity Reports

Use Case ID:	REPT003		
Use Case Name:	Run Community Activity Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs community activity reports.
Trigger:	User requires summary or detail of community activities.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, funding, location) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed. 5. If summary report is in HTML, user with appropriate role may drill down to detail information.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	1. Client listing reports are available only to users with LOA and LPHS roles. 2. Client summaries and listings are available only for user's jurisdiction. 3. State staff can run reports for multiple jurisdictions.
Currently Performed by SHERE?	Yes. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	

REPT005 – Run System Activity Reports

Use Case ID:	REPT005		
Use Case Name:	Run System Activity Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs system activity reports.
Trigger:	User requires summary or detail of system activities.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, funding, location) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed. 5. If summary report is in HTML, user with appropriate role may drill down to detail information.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	1. Client listing reports are available only to users with LOA and LPHS roles. 2. Client summaries and listings are available only for user's jurisdiction. 3. State staff can run reports for multiple jurisdictions.
Currently Performed by SHERE?	Yes. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	

REPT006 – Run Brief Contact Reports

Use Case ID:	REPT006		
Use Case Name:	Run Brief Contact Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs brief contact reports.
Trigger:	User requires summary or detail of brief contacts.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, funding, location) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed. 5. If summary report is in HTML, user with appropriate role may drill down to detail information.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	1. Client listing reports are available only to users with LOA and LPHS roles. 2. Client summaries and listings are available only for user's jurisdiction. 3. State staff can run reports for multiple jurisdictions.
Currently Performed by SHERE?	Yes. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	

REPT007 – Run Program Enrollment Reports

Use Case ID:	REPT007		
Use Case Name:	Run Program Enrollment Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs program enrollment reports.
Trigger:	User requires summary or detail of program enrollments.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, funding, location) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed. 5. If summary report is in HTML, user with appropriate role may drill down to detail information.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	1. Client listing reports are available only to users with LOA and LPHS roles. 2. Client summaries and listings are available only for user's jurisdiction. 3. State staff can run reports for multiple jurisdictions.
Currently Performed by SHERE?	Yes. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	

REPT008 – Run Client Screening Eligibility Reports

Use Case ID:	REPT008		
Use Case Name:	Run Client Screening Eligibility Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs client screening eligibility reports.
Trigger:	User requires summary or detail of client screening eligibility.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, funding, location) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed. 5. If summary report is in HTML, user with appropriate role may drill down to detail information.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	1. Client listing reports are available only to users with LOA and LPHS roles. 2. Client summaries and listings are available only for user's jurisdiction. 3. State staff can run reports for multiple jurisdictions.
Currently Performed by SHERE?	Yes. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	

REPT009 – Run Formal/Informal Supports Reports

Use Case ID:	REPT009		
Use Case Name:	Run Formal/Informal Supports Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs formal/informal supports reports.
Trigger:	User requires summary or detail of formal/informal supports.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, funding, location) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed. 5. If summary report is in HTML, user with appropriate role may drill down to detail information.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	1. Client listing reports are available only to users with LOA and LPHS roles. 2. Client summaries and listings are available only for user's jurisdiction. 3. State staff can run reports for multiple jurisdictions.
Currently Performed by SHERE?	Yes. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	

REPT010 – Run Program Objective Reports

Use Case ID:	REPT010		
Use Case Name:	Run Program Objective Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs Program Objective reports.
Trigger:	User requires summary or detail of activities that support Program Objectives.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, funding, location) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed. 5. If summary report is in HTML, user with appropriate role may drill down to detail information.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	4 – Occasional
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	1. Client listing reports are available only to users with LOA and LPHS roles. 2. Client summaries and listings are available only for user's jurisdiction. 3. State staff can run reports for multiple jurisdictions.
Currently Performed by SHERE?	Yes. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	

REPT011 – Run Client Profile Detail Reports

Use Case ID:	REPT011		
Use Case Name:	Run Client Profile Detail Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs Client Profile Detail report.
Trigger:	User requires listing of demographic, household, enrollment, and activity information for a specific client.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User enters client identifier. 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed. 5. If summary report is in HTML, user with appropriate role may drill down to detail information.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	1. Client listing reports are available only to users with LOA and LPHS roles. 2. Client summaries and listings are available only for user's jurisdiction. 3. State staff can run reports for multiple jurisdictions.
Currently Performed by SHERE?	No.
Notes and Issues:	

REPT012 – Run Billing Reports

Use Case ID:	REPT012		
Use Case Name:	Run Billing Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs billing reports.
Trigger:	User requires summary or detail of activity billing.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, funding, location) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed. 5. If summary report is in HTML, user with appropriate role may drill down to detail information.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	1. Client listing reports are available only to users with LOA and LPHS roles. 2. Client summaries and listings are available only for user's jurisdiction. 3. State staff can run reports for multiple jurisdictions.
Currently Performed by SHERE?	Yes. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	

REPT013 – Run Risk Factor Reports

Use Case ID:	REPT013		
Use Case Name:	Run Risk Factor Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs risk factor reports.
Trigger:	User requires summary or detail of risk factors.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, funding, location) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed. 5. If summary report is in HTML, user with appropriate role may drill down to detail information.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	1. Client listing reports are available only to users with LOA and LPHS roles. 2. Client summaries and listings are available only for user's jurisdiction. 3. State staff can run reports for multiple jurisdictions.
Currently Performed by SHERE?	Yes. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	

REPT014 – Run Title V Reports

Use Case ID:	REPT014		
Use Case Name:	Run Title V Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs Title V Reports.
Trigger:	User requires information for Title V federal reporting.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, funding, location) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed. 5. If summary report is in HTML, user with appropriate role may drill down to detail information.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	4 – Occasional
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	1. Client listing reports are available only to users with LOA and LPHS roles. 2. Client summaries and listings are available only for user's jurisdiction. 3. State staff can run reports for multiple jurisdictions.
Currently Performed by SHERE?	Yes. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	

REPT015 – Run Time Reporting Reports

Use Case ID:	REPT015		
Use Case Name:	Run Time Reporting Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users
Description:	User runs time reporting reports.
Trigger:	User requires report of time spent on specific activities.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, funding, location) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed. 5. If summary report is in HTML, user with appropriate role may drill down to detail information.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	1. Client listing reports are available only to users with LOA and LPHS roles. 2. Client summaries and listings are available only for user's jurisdiction. 3. State staff can run reports for multiple jurisdictions.
Currently Performed by SHERE?	Yes, but only at the activity summary level in the ad hoc reports. Activities that perform multiple services cannot be broken down by time spent on each service. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	

REPT016 – Create Mailing Labels

Use Case ID:	REPT016		
Use Case Name:	Create Mailing Labels		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User creates printed mailing labels.
Trigger:	User requires mailing labels for a specific subset of clients.
Preconditions:	
Postconditions:	Mailing labels sent to printer.
Normal Flow:	1. User selects report(s). 2. User selects client parameters (e.g. date range, activity, program, location). 3. Resulting mailing list is displayed. 4. If list appears appropriate, user sends print job to printer. 5. Printer produces mailing labels.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	3 – Moderate
Frequency of Use:	3 – Infrequent
Business Rules:	
Special/Security Requirements:	4. Mailing labels can be produced only for user's jurisdiction. 5. State staff can run mailing labels for multiple jurisdictions.
Currently Performed by SHERE?	No.
Notes and Issues:	

REPT017 – Run Birth Record Reports

Use Case ID:	REPT017		
Use Case Name:	Run Birth Record Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs birth record reports.
Trigger:	User requires report of birth records passed to system.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, funding, location) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed. 5. If summary report is in HTML, user with appropriate role may drill down to detail information.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	1 – Essential
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	Birth record reports are only accessible by individuals with appropriate access to Vital Records data.
Currently Performed by SHERE?	No.
Notes and Issues:	

REPT018 – Run e|Outcomes Processing Reports

Use Case ID:	REPT018		
Use Case Name:	Run e|Outcomes Processing Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs e|Outcomes processing reports.
Trigger:	User requires report of e|Outcomes clients processed.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, funding, location) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed. 5. If summary report is in HTML, user with appropriate role may drill down to detail information.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	1. Client listing reports are available only to users with LOA and LPHS roles. 2. Client summaries and listings are available only for user's jurisdiction. 3. State staff can run reports for multiple jurisdictions.
Currently Performed by SHERE?	Yes. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	

REPT019 – Run Data Exchange Audit Reports

Use Case ID:	REPT019		
Use Case Name:	Run Data Exchange Audit Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	State Admins
Description:	User runs reports detailing data exchanges with external systems.
Trigger:	User requires data exchange audit report.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, data exchange description) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	
Currently Performed by SHERE?	No.
Notes and Issues:	

REPT020 – Run Partner System Data Exchange Audit Reports

Use Case ID:	REPT020		
Use Case Name:	Run Partner System Data Exchange Audit Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	State Admins
Description:	User runs reports detailing data exchanges with partner case management systems.
Trigger:	User requires partner system data exchange audit report.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, partner system data exchange description) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	
Currently Performed by SHERE?	No.
Notes and Issues:	

REPT021 – Run Ad Hoc Reports

Use Case ID:	REPT021		
Use Case Name:	Run Ad Hoc Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs ad hoc report, selecting specific data elements and filters to appear on the resulting report.
Trigger:	User requires ad hoc report.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. Use selects data elements to appear on report(s). 3. User sets report parameters (e.g. date range, jurisdiction) 4. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 5. Resulting report is displayed.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	Access to ad hoc reporting features is limited to individuals who have received additional training.
Currently Performed by SHERE?	Yes. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	

REPT022 – Run Data Correction QA Reports

Use Case ID:	REPT022		
Use Case Name:	Run Data Correction QC Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users State Admins Other Partner Agency Users, including Tribal Agencies
Description:	User runs Data Correction QA Reports (e.g., Edinburgh Depression), detailing changed historical data.
Trigger:	User requires Data Correction QA Report.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. Use selects data elements to appear on report(s). 3. User sets report parameters (e.g. date range) 4. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 5. Resulting report is displayed.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	2 – Frequent
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	
Currently Performed by SHERE?	Yes. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	

REPT023 – Run System Audit Reports

Use Case ID:	REPT023		
Use Case Name:	Run System Audit Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users State Admins Other partner agency users
Description:	User runs System Audit Reports, detailing access of specific functions by specific users.
Trigger:	User requires System Audit Reports.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, user, function) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	4 – Occasional
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	
Currently Performed by SHERE?	Yes. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	

REPT024 – Run Data Export Audit Reports

Use Case ID:	REPT024		
Use Case Name:	Run Data Export Audit Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	State Admins
Description:	User runs Data Export Audit Reports, detailing downloaded reports run by specific users.
Trigger:	User requires Data Export Audit Reports.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g. date range, user, data export type) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	4 – Occasional
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	
Currently Performed by SHERE?	Yes. SPHERE does not currently allow ability to choose output format.
Notes and Issues:	

REPT025 – Run Users And Roles Reports

Use Case ID:	REPT025		
Use Case Name:	Run Users And Roles Reports		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	State Admins
Description:	User runs Users And Roles Reports, listing users and assigned roles.
Trigger:	User requires Users And Roles Reports.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User selects report(s). 2. User sets report parameters (e.g., jurisdiction, role) 3. User selects output format (i.e. PDF, RTF, spreadsheet file, HTML) 4. Resulting report is displayed.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	4 – Occasional
Business Rules:	1. Selected parameters must display on resulting report. 2. Selected parameters must be retained when navigating between report selection pages. 3. All summary reports must allow drill down to detail information.
Special/Security Requirements:	
Currently Performed by SHERE?	No.
Notes and Issues:	

REPT026 – Run Activity Detail Report

Use Case ID:	REPT026		
Use Case Name:	Run Activity Detail Report		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs activity detail report from activity entry screen, producing printer friendly output with signature block.
Trigger:	User requires Activity Detail Report.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User navigates to activity entry screen. 2. User clicks link to produce activity detail report.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	1 – Very Frequent
Business Rules:	
Special/Security Requirements:	
Currently Performed by SHERE?	Yes.
Notes and Issues:	

REPT027 – Run Activity Notes Report

Use Case ID:	REPT027		
Use Case Name:	Run Activity Notes Report		
Created By:	SPHERE Group	Last Updated By:	
Date Created:	November 11, 2011	Date Updated:	

Actors:	LPHD Users Other Partner Agency Users State Admins DPH Staff (CO/RO)
Description:	User runs activity notes report from activity summary listing.
Trigger:	User requires activity notes report.
Preconditions:	
Postconditions:	Results of report query displayed on screen or in spreadsheet file.
Normal Flow:	1. User navigates to activity summary listing. 2. User clicks link to produce client notes report.
Alternative Flows:	
Exceptions:	
Includes:	
Priority:	2 – High
Frequency of Use:	1 – Very Frequent
Business Rules:	Reports can either list activity notes by themselves or alongside associated activity summary.
Special/Security Requirements:	
Currently Performed by SHERE?	Yes.
Notes and Issues:	

V. Appendix

The following sections identify the data elements currently collected by SPHERE for each functional area defined in this document. These can be used as a guideline for the scope of data needed to satisfy each requirement.

A. Client Demographic Data Elements

Last Name	Health Care Site Description
First Name	Has Dental Care Provider
Middle Initial	Health Care Coverage Type
Maiden Name	Address Type (Mailing/Home)
Birth Date	Line 1 Address
Gender	Line 2 Address
Interpreter Needed Switch	Line 3 Address
Education Level	Address City
Marital Status	Address Town
Deceased Switch	Address Town
Deceased Date	Address ZIP Code
Contact By Phone Yes/No Switch	Address Comments
Day Phone	Address County
Night Phone	Address Pre1950
Phone Best Time	Address No Contact Switch
E-mail Address	Address State
Phone Comments	Address Effective Date
Ethnicity	Health Needs Assessment Date
Occupation	Secondhand Smoke Exposure Switch
Language	Pregnant Or Within 60 Days Of Pregnancy Switch
Interpreter Provided Switch	Chronic Condition Switch
Day Phone Area Code	Condition Diagnosed By Health Care Provider Switch
Day Phone Prefix	Vision Impaired Switch
Day Phone Number	Hearing Impaired Switch
Day Phone Extension	Receives SSI Switch
Night Phone Area Code	Primary Chronic Diagnosis
Night Phone Prefix	Secondary Chronic Diagnosis
Night Phone Number	Smoker Switch
Night Phone Extension	Requires Visual Assistance Switch
Cell Phone Area Code	Requires Hearing Assistance Switch
Cell Phone Prefix	General Diagnosis Category
Cell Phone Number	Primary Diagnosis Code
Cell Phone Extension	Secondary Diagnosis Code
Interpreter Offered	Additional Diagnosis Code
Race	Secondhand Smoke Exposure Location
Name History	Significant Contact First Name
HMO	Significant Contact Last Name
Dental Coverage Type	Significant Contact Area Code
Has Primary Care Provider Switch	Significant Contact Phone Prefix
Primary Care Provider Name	Significant Contact Phone Number
Has Dental Coverage Switch	Significant Contact Phone Extension
Dental Care Provider Name	Significant Contact Comments
Medical Assistance Number	Significant Contact Relationship To Client
Has Health Insurance/Medicaid	Formal/Informal Support Assessment Date
Health Coverage Assessment Date	Count of Resources Identified
Health Care Usual Site	Formal Support Switch

B. Household Data Elements

Household Size
Household Gross Income
Household Percent of Poverty Level
Household Type
Household Income Range
Date Finances Assessed
Household Income Period

C. Enrollment Data Elements

Date Assessed For Program
Enrollment Status
Enrollment Begin Date
Enrollment End Date
Pregnant Switch
Pregnancy Due Date
Discharge Date
Discharge Reason
Service Category
Service Detail

D. Brief Contact Data Elements

Brief Contact Date
Brief Contact Method
County
Program
Service
Contact Hour
Contact Minute
Contact Name
Organization
Staff Name
Charge To
Funding Code
Information/Service Requested
Intervention

E. Activity Data Elements

All Activities	**Clinical Breast Exam (cont'd)**
Activity Date	Diagnosis Code
Activity Method	CPT code
Location Type	Recommendation
Location Name	Provider
Client/Collateral Activity Switch	
Next Activity Date	**Breast Screening History**
Client Referred By	Prior Mamogram Date
Travel Miles	Prior Mammograms Switch
Organiztion Providing Activity	Breast Symptoms Reported Switch
Program	Self-Exam Switch
Service	Breast Cancer History Switch
Additional Outcome Information	Family History Switch
Travel Time Hours	Left Side Mastectomy Switch
Travel Time Minutes	Right Side Mastectomy Switch
Activity Time Hours	
Activity Time Minutes	**Case Management**
Recordkeeping Time Hours	Initial/Follow Up Assessment
Recordkeeping Time Minutes	Health Care Assessment Switch
Status	Health Care Need Identified
Client	Health Care Outcome
Funding	Dental Assessment Switch
Next Activity Reason	Dental Need Identified
Activity Note	Dental Outcome
Charge To	Nutrition Assessment Switch
Health and Infrastructure Priority	Nutrition Need Identified
Special Populations:	Nutrition Outcome
Activity Staff	Financial Resources Assessment
Methods to Support Intervention:	Financial Resources Need Identified
Activity Intervention	Financial Resources Outcome
Activity	Legal Services Assessment
Audience Focus	Legal Services Need Identified
	Legal Services Outcome
Alchohol and Drug Use	Community Services Assessment
Client Feels More Usage Than Planned	Community Services Need Identified
Client Feels Need To Reduce	Community Services Outcome
One Drink Last 30 Days	Vocational/Educational Assessment
Five Drinks Last 30 Days	Vocational/Educational Need Identified
Times Drove When Drinking	Vocational/Educational Outcome
Times Rode With Drinking Driver	ADL/Child Development Assessment
Drug Use Past Year	ADL/Child Development Need Identified
Drugs Used	ADL/Child Development Outcome
	Emotional/Mental Health Assessment
Clinical Breast Exam	Emotional/Mental Health Need Identified
Lab Name	Emotional/Mental Health Outcome
Result Date	Client Social Interaction/Support Assessment
Result	Client Social Interaction/Support Need Identified

Activity Data Elements (continued)

Case Management (cont'd)	**Child Passenger Safety Seat (cont'd)**
Client Social Interaction/Support Outcome	Correct Seat Provided
Family Social Interaction/Support Assessment	Demonstrates Correct Installation
Family Social Interaction/Support Need Identified	Rear Facing Seat
Family Social Interaction/Support Outcome	Convertible Rear Facing Seat
Parenting Assessment	Convertible Forward Facing Seat
Parenting Need Identified	Toddler Seat
Parenting Outcome	Hybrid Seat
Physical environment/housing Assessment	Booster Seat
Physical environment/housing Need Identified	Type Recommended By Staff
Physical environment/housing Outcome	Correct Seat Referral Provided
Clothing/environmental Assessment	Caregiver Declined Recommendation
Clothing/environmental Need Identified	Other Seat Type
Clothing/environmental Outcome	Misuse Identified
Transportation Assessment	Other Misuse Types
Transportation Need Identified	
Transportation Outcome	**Contraceptive Services**
Recreation Assessment	CPT Code
Recreation Need Identified	No Method Selected
Recreation Outcome	Method Declined
Child Care Assessment	Method Referred
Child Care Need Identified	Other Method
Child Care Outcome	DX Code
Translation services Assessment	Method Provided
Translation services Need Identified	Contraceptive Brand
Translation services Outcome	Contraceptive Quality
Target Population	Contraceptive Lot Number
	Contraceptive Expiration Date
Cervical Screening	
Prior Pap Smear Date	**Developmental Assessment**
Prior Pap Smear Switch	Development Assessment Type
Hysterectomy Switch	Gross Motor Percentile
Cervical Cancer Related Hysterectomy Switch	Fine Motor Percentile
History of Cervical Cancer Switch	Language Percentile
Cervix Present Switch	Personal/Social Percentile
History of Cervical Dysplasia/ASCUS Switch	Below Cutoff Flag
Smoker Switch	Plan Of Action
	Issue Resolved
Child Passenger Safety Seat	Recommendation
Child Or Pregnant Woman Switch	
Seat Present Switch	**Developmental Assessment ASQ2**
Correct Use Switch	ACT_ID
Person Demonstrating	3+ Weeks Premature
Other Person Demonstrating	Corrected DOB
Correction/Adjustments Made	Questionnaire Administered

Activity Data Elements (continued)

Developmental Assessment ASQ2 (cont'd)	Developmental Assessment ASQ:SE (cont'd)
Communications Domain Score	Imported from e|Ouctomes
Gross Motor Domain Score	Plan Of Action
Fine Motor Domain Score	Outcome Date
Problem Solving Domain Score	Outcome Description
Personal/Social Domain Score	
Age Appropriate Scores	**Disease & Health Event Investigation - STI**
Parental Concern	STI Lab
Plan Of Action Entered	STI Result
Imported from e|Ouctomes	STI Recommendation
Plan Of Action	STI Diagnosis
Outcome Date	STI Complete
Outcome Description	Date Specimen Analyzed
	STI Type
Developmental Assessment ASQ3	STI Proven
3+ Weeks Premature	
Corrected DOB	**Fluoride Assessment**
Questionnaire Administered	Drinks Water From Community/Public Supply
Communications Domain Score	Community/Public Water Supply Type
Gross Motor Domain Score	Particpates In Fluoride Varnish Program
Fine Motor Domain Score	Varnish Program Location
Problem Solving Domain Score	Private Well Water
Personal/Social Domain Score	Private Well, Tested
Age Appropriate Scores	Private Well, Fluoride Deficient
Parental Concern	Participates In Fl Supplement Prgoram
Plan Of Action Entered	Supplement Program Location
Imported from e|Ouctomes	Participates In School-Based Fluoride Mouth Rinse Program
Results Shared With Physician	Flouride Assessment Type
Plan Of Action	
Outcome Date	**Grief Bereavement**
Outcome Description	First Name
Plan Of Action Notes	Last Name
	Relationship To The Deceased
Developmental Assessment ASQ:SE	Notes
3+ Weeks Premature	Assessment Area
Corrected DOB	Warden's Tasks Of Grieving Notes
Questionnaire Administered	Progress: Acknowledge the Reality of the Loss
Communications Domain Score	Progress: Experiencing the Pain of Grief
Gross Motor Domain Score	Progress: Adjusting to Life without the Person
Fine Motor Domain Score	Progress: Reinvestment in Emotional Energy
Problem Solving Domain Score	Head Circumference
Personal/Social Domain Score	Head Circumference
Age Appropriate Scores	Percentile
Parental Concern	Recommendation
Plan Of Action Entered	

Activity Data Elements (continued)

Health Care Utilization	**Height/Weight (cont'd)**
Last Routine Health Exam	Body Mass Index Percentile
Could Not Afford Routine Exam	Ht/Wt Percentile
Inadequate Insurance	Ht/Age Percentile
Cultural/Language Barrier	Recommendation
Transportation Barrier	Height Decimal
Could Not Take Time	
Does Not Have Doctor	**Hemoglobin/Hematocrit**
Routine Exam Not Needed	Assessment Type
Unknown	Lab
Exam Refused	Result Date
Injuries Past 12 Months	Result
Injury In Home	Diagnosis
Injury Type	CPT
Injury At Work	Recommendation
Injury At School	Hematocrit Result
Injury At Childcare	Hemoglobin Result
Other Injury Location	Provider
ER Visits Last 12 Months	
ER Visits Physical Injury	**Home Inventory**
ER Visits Dental Emergency	Assessment Type
Inpatient Admissions Last 12 Months	Infant Responsibility Score
Immunizations Up To Date	Infant Acceptance Score
Oral Health Services Site	Infant Organization Score
Last Oral Health Visit	Infant Materials Score
Cannot Afford Oral Health	Infant Involvement Score
Inadequate Oral Health Insurance	Infant Variety Score
Oral Health Cultural/Language Barrier	Infant Total Score
Oral Health Transportation Barrier	Infant Score Indicates Caution
Oral Health Could Not Take Time	Infant Notes
Oral Health Does Not Have Doctor	Child Materials Score
Oral Health Routine Exam Not Needed	Child Language Score
Oral Health Unknown	Child Environment Score
Oral Health Exam Refused	Child Responsivity Score
Reason Refused Oral Health Exam	Child Academic Score
Dental Sealants	Child Modeling Score
Dental Sealants Location	Child Variety Score
Oral Health Other Site	Child Acceptance Score
	Child Total Score
Height/Weight	Child Score Indicates Caution
Height	Child Notes
Weight Pounds	Infant Total Score Indicates Caution
Weight Ounces	Child Total Score Indicates Caution
Body Mass Index	Imported From e|Outcomes

Activity Data Elements (continued)

Home Safety Assessment	**Infant Assessment (cont'd)**
Target Population	Birth Order
Rent/Own Indicator	Birth Plurality
Assessment Completion Date	Birth APGAR 1 Min
Dwelling Type	Birth APGAR 5 Min
Address	Birth Gestational Age
Unable To Follow-Up	Gestational Age Unknown
Reason For No Follow-Up	Abnormal Conditions Switch
Other Dwelling Type	Abnormal Condition
Assessment Type (Initial/Follow-Up)	Other Abnormal Conditions
Reason Assessment Incomplete	Congenital Anomalies Switch
Imported From e|Outcomes	Congenital anomalies
Problem Identification	Immunization Status
Reason Unable To Assess	Imm Overdue Due To Illness/Medical Reason
Problem Identified	Imm Overdue Due To Transportation Barrier
Correction	Imm Overdue Due To Work/Clinic Schedule Barrier
Health Teaching	Imm Overdue Due To Other Reason
Comments	Specific Other Reason For Imm Overdue
	Immunization Exemptions Switch
Infant Assessment	Imm Status Verified By Immunization Card
Mother Is Client Switch	Imm Status Verified By WI Immunication Registry
Mother/Guardian Name	Imm Status Verified By MD/Provider
Mother/Guardian DOB	Total Baby Health Exams Completed
Birth Facility Name	Exam Overdue Due To Illness/Medical Reason
Birth Facility Type	Exam Overdue Due To Transportation Barrier
Birth Faciliaty US Switch	Exam Overdue Due To Work/Clinic Schedule Barrier
Birth Facility Outside US Description	Exam Overdue Due To Other Reason
Birth Facility State	Specific Other Reason For Exam Overdue
Birth Facility WI County	ER Visits Since Last Visit
Birth Facility Non-WI County	ER For Medical Illness
Birth Facility Municipality Type	ER For Physical Injury
Birth Facility Municipality	Injuries Since Last Assessment
Birth Attendant Title	Injury
Baby Transferred	Other Injury
Date of Transfer	Medical Risk Factors Switch
Facility Transferred To	Medical Risk Factors
Location of Transfer Facility	How Baby Is Put To Bed
Baby in NICU	Offered Pacifier
Days In NICU	Sleep Environment Problem Switch
Days In NICU Unknown	Sleep Environment Problem Concern
Birth Weight Pounds	Secondhand Smoke Switch
Birth Weight Ounces	Secondhand Smoke Location
Birth Length Inches	Other Secondhand Smoke Location
Birth Length Eighths Of Inches	Smoke Detector Concern Switch

Activity Data Elements (continued)

Infant Assessment (cont'd)	Infant Assessment (cont'd)
Smoke Detector Not Installed	Age First Received Formula Unknown
Smoke Detector Not Working	Powder Formula
Smoke Detector Incorrectly Placed	Concentrate Formula
Smoke Detector Other Problem	Ready-To-Feed Formula
Specific Other Smoke Detector Problem	Unknwon Formula Type
Lead Hazard Switch	Type of Formula Used
Pre-1978 House	Special Type Of Formula Used
Peeling-Chipping Paint	Proper/Improper Formula Preparation
Evdence Of Water Damage	Proper/Improper Formula Dilution
Other Lead Hazard	Proper/Improper Formula Storage
Specific Other Lead Hazard	Main Drinking Water Source
Baby Uses Car Seat Switch	Well Water Testing Status
Baby on WIC	Drinking Water Fluoridated
Reason Not On WIC	Items In Bottle
How Baby Is Fed	Other Bottle Items
Other Baby Feeding Information	Put To Bed With Bottle
Vitamin D Supplement	Bottle Propped
Breastfeeding Going Well Switch	Baby Drinks From Cup Switch
Breastfeeding Problems	Baby Drinks From Cup/Glass
Other Breasfeeding Problems	Baby Drinks From Spill-Proof Container
Baby Ever Breastfed	Baby Drinks From Training Cup With Lid
Breastfeed Duration	Age Baby Stopped Using Bottle
Reason For Stopping Breastfeeding	Age First Received Baby Cereal
Other Reason For Stopping Breastfeeding	Age First Received Baby Juice
Recognizes When Baby Hungry/Full	Age First Received Baby Food
Baby Sucks On Hand	Age First Received Finger Foods
Baby Turns To Root And Makes Sucking Motion	Amount Of Juice Per Day
Baby Opens Mouth	Amount Of Sweetened Beverages Per Day
Baby Reaches For Food	Appropriate Feeding Practices Switch
Baby Other Signs Of Hunger	Inappropriate Practice
Specific Other Signs Of Hunger	Other Inappropriate Practice
Baby Lets Go Of Nipple	Family Enough To Eat Last Month
Baby Turns Head Away	Family Participating In Food Programs
Baby Won't Open Mouth	Food Program
Baby Other Signs Of Fullness	Baby Given Vitamin/Mineral/Herbal Supplements
Specific Other Signs Of Fullness	Vitamin/Supplement
Unknown Feedings In 24 Hours	Other Vitamin/Supplement
Breastfeedings In 24 Hours	Psychosocial Risk Factors Switch
Ounces Per Bottle	Psychosocial Risk factors
Formula Feedings In 24 Hours	Health Care Coverage Record Current
Total Ounces Consumed Per Day	Health Needs Record Current
Age First Received Formula	Weight For Age Growth Percentile

Activity Data Elements (continued)

Injury Prevention Assessment	**Injury Prevention Assessment (cont'd)**
Injury Prevention Assessment Type	Skating Prob
Burns	Skating result
Burns Prob	ATV
Burns Result	ATV Prob
Choking	ATV Result
Choking Prob	Snowmobile
Choking Result	Snowmobile Prob
Cuts	Snowmobile Result
Cuts Prob	Bites
Cuts Result	Bites Prob
Drowning	Bites Result
Drowning Prob	Machinery
Drowning Results	Machinery Prob
Falling Objects	Machinery Result
Falling Objects Prob	Suicide
Falling Objects Result	Suicide Prob
Falls	Suicide Result
Falls Prob	Other
Falls Result	Other Prob
Fire	Other Result
Fire Prob	Injury Tool
Fire Result	
Guns	**Lead Testing Detail**
Guns Prob	Lead Test Type
Guns Result	Lead Test Lab
Poison	Lead Test Date
Poison Prob	Lead Test Result
Poison Result	Lead Diagnosis Code
Suffocation	Lead CPT Code
Suffocation Prob	Lead Activity ID
Suffocation Result	Erythrocyte
Bicycle	Erythrocyte Type
Bicycle Prob	Lead Recommendation
Bicycle Result	Lead Provider
Child Passenger	
Child Passenger Prob	**Mammogram**
Child Passenger Result	Mammogram Type
Motor Vehicle	Mammogram Result Date
Motor Vehicle Prob	Mammogram Result
Motor Vehicle Result	Mammogram Diagnosis Code
Pedestrian	Mammogram CPT Code
Pedestrian Prob	Mammogram Recommendation
Pedestrain Result	Mammogram Activity ID
Skating	Mammogram Provider

Activity Data Elements (continued)

Nutrition & Physical Activity	**Parent to Parent of Wisconsin**
Dietary Assessment Tool	Received Referral From
Non-Standard Dietary Assessment Tool	Received Referral Date
Daily Servings Of Fruit	Parent Match Type
Daily Servings Of Vegetables	Parent Match Other
Daily Servings Of Juice	Parent Name
Daily Servings Of Dairy	Match Date
Daily Ounces Of Soda	Date Of First Contact
Daily Ounces Of Water	Contact Count
Milk Type Consumed	Progress On Identified Need
Portion Size Within Normal Limits	Parent Match Outcome
Nutrient Deficiency	Plan To Offer Another Match
Multivitamin	Reason Unsuccessful
Other Supplement	
Oral Supplement	**Pelvic Exam**
Herbal Supplement	Pelvic Exam Result Date
Weekly Meals Away From Home	Pelvic Exam Result
Video Hours Per Day	Pelvic Exam Diagnosis Code
Electronic Game Hours Per Day	Pelvic Exam CPT Code
Days Per Week 30+ Minutes Exercise	Pelvic Exam Recommendation
Nutrition Last 30 Days	Pelvic Exam Provider
NUTR2ACT_ACTIVITY_ID	
Weight Class	**Physical Exam/Office Visit**
Nutrition Provider	Physical Exam Periodicity
Weight Control Activities Last 30 Days	Physical Exam Diagnosis Code
	Physical Exam CPT Code
Oral Health Assessment	Physical Exam Provider
Untreated Caries	Physical Exam Type
Treated Caries	
Early Childhood Caries	**Postpartum Assessment**
Sealants On Permanent Molas	Folic Supp During Pregnancy
Treatment Urgency	Folic Supp Trimester
Natural Teeth	Gestational Diabetes
Missing Permanent Molar Due To Dental Caries	UTIs During Pregnancy
Caries Experience	UTI Test Switch
	UTI Test Count
Pap Smear	STIs During Pregnancy
Pap Smear Lab	STI Test Switch
Pap Smear Result Date	STI Test Count
Pap Smear Result	Antibiotics During Pregnancy
Pap Smear Diagnosis Code	WIC During Pregnancy
Pap Smear CPT Code	WIC Months
Pap Smear Recommendation	No WIC Reason
Pap Smear Provider	Medicaid During Pregnancy

Activity Data Elements (continued)

Postpartum Assessment (cont'd)	Postpartum Assessment (cont'd)
Medicaid Months	Other Contraception
No Medicaid Reason	Condoms
Food Share During Pregnancy	Male Condoms
Food Share Months	Female Condoms
No Food Share Reason	Emergency Contraception
TANF During Pregnancy	Contraception Arranged At Delivery
TANF Months	At Delivery Primary Method
No TANF Reason	Emergency Contraception
Attended Birth Education Class	Cervical Cap
Birth Losses From Current Pregnancy	Diaphragm
Weight Gain/Loss	Implant
Weight Change Pounds	Injectible (Depo-Provera)
Weight Change Ounces	IUD
Pre-Pregnancy BMI	Oral Contraceptives
Height Feet	Spermicidal
Height Inches	Sterliziation
Pre-Pregnancy Weight Pounds	Tubal Ligation
Pre-Pregnancy Weight Ounces	Vasectomy
Prenatal Visit Count	Transdermal Patch
Postpartum Visit Switch	Vaginal Ring
Postpartum Visit Timing	Other Contraception
Postpartum Visit Scheduled Switch	Condoms
Contraception Arranged After Delivery	Male Condoms
Contraceptive Appointment Scheduled	Female Condoms
Contraception Use Undecided	Contraception Arrange After Delivery
Contraception Method Undecided	Plan to Continue
Contraception Unwanted	Post-Delivery Primary Method
Using Natural Family Planning	Cervical Cap
Using Abstinence	Diaphragm
Using Withdrawal	Implant
No Current Partner	Injectible (Depo-Provera)
Contraception Arragned Prior To Delivery	IUD
Pre-delivery Primary Method	Oral Contraceptives
Cervical Cap	Spermicidal
Diaphragm	Sterliziation
Implant	Tubal Ligation
Injectible (Depo-Provera)	Vasectomy
IUD	Transdermal Patch
Oral Contraceptives	Vaginal Ring
Spermicidal	Other Contraception
Sterliziation	Condoms
Tubal Ligation	Emergency Contraception
Vasectomy	Post-Delivery Contraception Referral
Transdermal Patch	Post-Delivery Folic Supplement
Vaginal Ring	Breastfeeding

Activity Data Elements (continued)

Postpartum Assessment (cont'd)	**Postpartum Assessment - Birth Record (cont'd)**
Breastfeeding Support	Pregnancy Outcome
Count of Children Breastfeeding	Delivery Type
Breastfeeding Duration	Birth Weight Pounds
Ever Breastfed	Birth Weight Ounces
Depression	Gestational Age Weeks
Lack of Interest	Days In NICU
Feeling Down	Baby Receiving WIC
Stress Level	No WIC reason
Additional Depression Screening Performed Switch	Feeding Method
Additional Depression Screening Tool	Other Feeding Method
Additional Depression Screening Tool Score	Ever Breastfed Switch
Score Indicates Risk For Depression	Breastfeeding Duration
Depression Risk Referral	Put To Bed Method
Smoked Since Delivery	Pacifier
Cigarettes Per Day	Sleep Environment Concerns
Smoker In Household	Father Involved In Child Care
Smoking Cessation Info Provided	Foster Home Placement
Alcohol Since Delivery	Adoption Placement
Drinks Per Week	APGAR Score
Alcohol Referral Made	Other Family Member Guardian
Street Drugs Since Delivery	Birth Order
Marijuana	
Cocaine	**Pregnancy Test**
Other Street Drugs	Last Menstrual Date
Methadone	Pregnancy Intended
Heroin	Diagnosis Code
Refused Type	CPT Code
Street Drug Usage Per Week	Pregnancy Result
Street Drug Usage Per Day	Contraceptive Method Used
Street Drug Referral Made	
Abused By Other Since Delivery	**Prenatal Assessment**
Domestic Violence Referral	Initial/Follow Up
Father Involved In Child Care	Limited English Proficiency
Put To Bed Method	Education Level
Pacifier	Highest Grade Completed
Sleep Environment Concern Switch	Dental Visit Count Prev 2 Years
Sleep Environment Concern	Due Date
Initial/Follow-Up Assessment	Last Menstrual Date
Diagnosis Code	Ideal Due Date
	First Prenatal Appointment Date
Postpartum Assessment - Birth Record	First Appointment Trimester
Infant First Name	No Visits Yet
Infant Last Name	Upcoming Appointment Date
DOB	Pre-Pregnancy Weight Pounds

Activity Data Elements (continued)

Prenatal Assessment (cont'd)	**Prenatal Assessment (cont'd)**
Pre-Pregnancy Weight Ounces	Unsafe At Home
Current Weight Pounds	Missed Meals Switch
Current Weight Ounces	Housing Problems Prev 3 Months
Height Feet	Homeless Switch
Height Inches	Transportation Problems
BMI	Depression
Multiple Fetus Switch	Lack Of Interest
Fetus Count	Stress Level
Breastfeeding Considered	People Counted On Count
HIV test Performed	Father Helping During Pregnancy Switch
Bleeding Or Cramping	Child Care
Receiving WIC	No Involvement
No WIC Reason	Concerns
Pre-Conception Multivitamins	Other Concern
Trimester Started Multivitamins	Greatest Worry
Previous Pregnancy Count	Method To Deal With Problems
Full-Term Baby Count	Who Will Help With Problems
3+ Weeks Early Count	Topics To Learn
Pregnancy Loss 20+ Week Count	Other Learning Topic
Pregnancy Loss <20 Week Count	Birth Education Class
Living Children Count	Additional Information
Babies < 5 Pounds	Additional Depression Screening
Babies 9+ Pounds	Trimester Of Depression Screening
Last Pregnancy End Date	Depression Screening Tool
Pregnancy Interval	Depression Screening Score
Last Pregnancy Outcome	Depression Risk
Any Medical Conditions Switch	Depression Referral
Dental Pain	Contraception On Hand
Smoked Before Pregnancy	Contraception Method Planned
Cigarettes Per Day	Primary Contraception Method Planned
Smoked During Pregnancy	Condoms
Smoked 1st Trimester	Emergency Contraception
Smoked 2nd Trimester	PNCC Eligible
Smoked 3rd Trimester	Medicaid Billing Time Hours
Smoking Habits Changed During Pregnancy	Medicaid Billing Time Minutes
Smoker In Household	ACT_ID
Alcohol Before Pregnancy	Assessment Completed Switch
Drinks Per Week	CPT Code
Alcohol During Pregnancy	Diagnosis Codes
Alcohol 1st Trimester	
Alcohol 2nd Trimester	**Referral and Follow-up**
Alcohol 3rd Trimester	Referral Follow Up Date
Street Drugs Past Year	Referral Type
Abused By Others	Referral Outcome

Activity Data Elements (continued)

Tobacco Use
Tobacco Quit Date
Age Started Smoking
Smoker In Household
Smoker In Car
Smoker At Work
Smoker At Other
Chooses Smoke-Free At Restaurants
Cigarettes Per Day
Cigar Smoker
Pipe Smoker
Tobacco Chewer
Smoking Status
Cigarettes Per Day Unknown
Tobacco Use States Of Change
Smoking Cessation Actions
Transition Assessment
Received Transition Planning Information
PCP Involved In Transition Planning
Client Has Written Transition Plan
Plan Addresses Health
Plan Addresses Education
Plan Addresses Vocation
Plan Addresses Housing
Plan Addresses Community Inclusion
Plan Addresses Mental Health
Plan Addresses Transportation
Plan Addresses Independent Living
Plan Addresses Guardianship
Plan Addresses Guardianship
Barriers To Transition
Additional Information