Helpful Hints for Getting Started with NJCHART

(Click on topic to go to section or individual question to read response.)

General Hints

After March 1, 2019, what is the role of SPECT versus NJCHART?

NJCHART and SPECT are two separate but integrated systems designed to change how CHW workers serve their clients. When conducting outreach, CHWs will still need to complete Initial Referral Forms and Community Health Screens in SPECT.

Once a referral is submitted to Central Intake and sent back to the program, the supervisor will change the client's status to Pending Enrolled and assign the client to a CHW in SPECT. Similarly, supervisors will use SPECT to assign PRA referrals to a CHW and to move them to Pending Enrolled status.

Once a client is assigned to Pending Enrolled status, all further documentation, including all contacts, referrals, education, and assessments should occur in NJCHART.

Can I use NJCHART with any internet browser?

Using NJCHART with Internet Explorer is not recommended. We suggest using Google Chrome or Safari to enter in CHART data.

What do I do if I can't log in to NJCHART?

Please contact FHI at njchart@fhiworks.org or call 856-665-6000 and ask for "NJCHART help".

Does the order in which the forms are entered into NJCHART matter?

The order that the forms are completed online does matter. In order to correctly complete the NJCHART assessment forms:

1. Make sure to complete the Demographic page and the Family Information page before going to the Assessments page.
2. When you get to the Assessments page, you will first be required to enter the Pregnancy Supplement, Postpartum Supplement and Child Under 5 forms if any are due.
3. Once they are complete, you will be able to select the Baseline Assessment and complete it.

How do I correct a woman's date of birth in NJCHART?

CHWs and supervisors do not have the authority to change a woman's Date of Birth (DOB). To have a woman's DOB changed, email njchart@fhiworks.org .

Where do I enter the Client Information form into NJCHART?

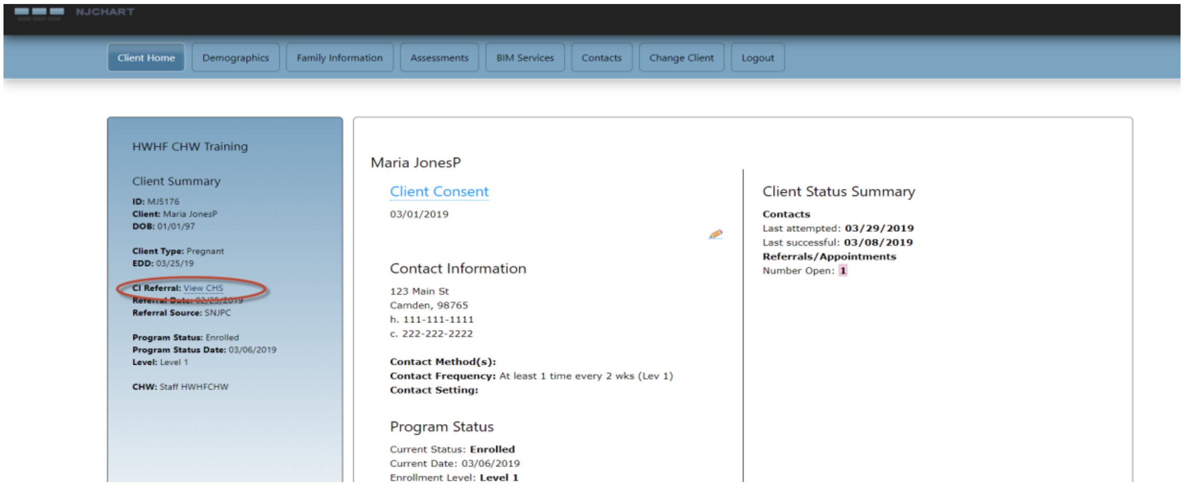
Click on the pencil on the Client Home page to enter the information into the Client Status and Contact Changes page.

Will data from the CHS and PRA in SPECT automatically fill forms in NJCHART?

Yes: wherever possible, information for questions that match CHS and PRA questions will pre-populate the Client Information form, Family Information Form, and the baseline assessment forms.

How can a CHW or supervisor review a client's completed PRA or CHS before entering new information into NJCHART?

Links to .pdf versions of the CHW and PRA documents are available in the Client Summary column on the left side of the Client Home screen.



What should a supervisor do if there are duplicate client records in NJCHART?

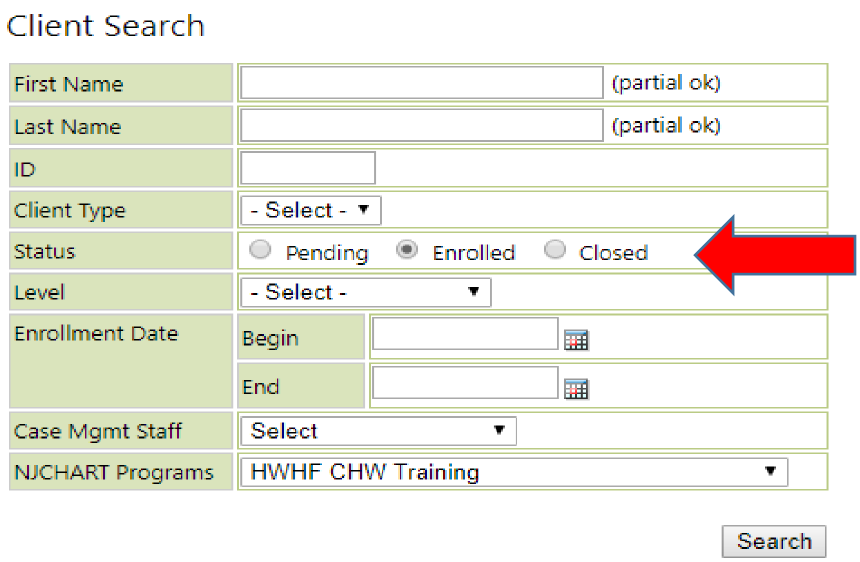
Supervisors should identify which client record has the least information and close that record. In order to close the duplicate record, use the Client Search feature, locate the desired client record, then select the close reason, “Duplicate.”

Client Search

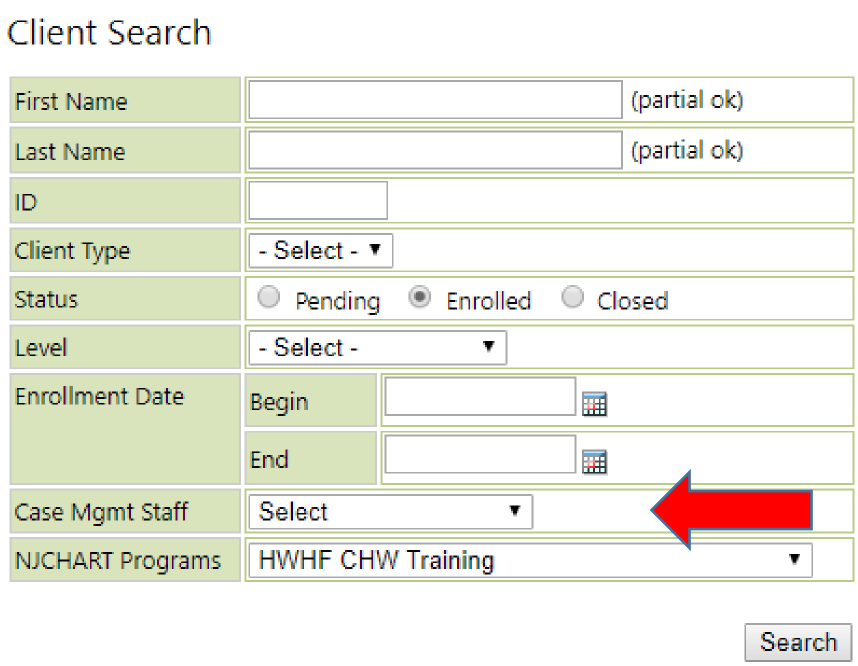
Why can't I find my clients using Client Search?

The most common error people make is not checking whether "Pending," "Enrolled" or "Closed" has been selected. To find a client using the Search Feature:

1. First select "Pending", "Enrolled", or "Closed"



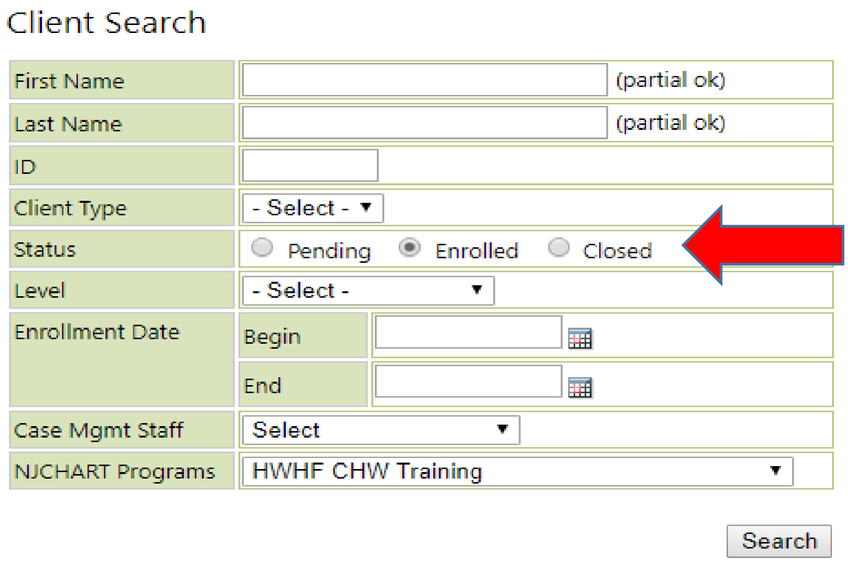
2. Then, select yourself as the "Case Mgmt Staff".



If you now click "Search," you will see a list of either your pending enrolled, enrolled, or closed clients, depending on which you selected. If you want a list of clients at a particular enrollment level, select the Level also.

How can I find a specific client using the Client Search feature?

1. First, select the client's status in the search input screen.



2. Then, enter information into only <u>one</u> of the fields. For example, you can enter the first few letters of the client's first name OR the first few letters of the client's last name OR the client's ID number. If you enter information into more than one field, you might be narrowing your search too much and are at greater risk of making an error, so less is better.

3. If you now click "Search," you will see a list of any clients matching the criteria you selected.

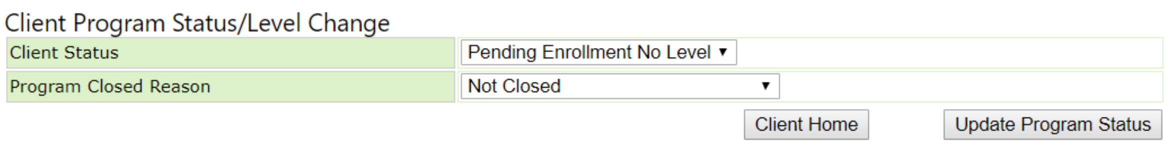
Changing a Client's Enrollment Status and Level

If I change a client's enrollment status in NJCHART, do I also need to change it in SPECT?

No: any changes to a client's enrollment status in NJCHART will automatically be made in SPECT.

How do I change a client's enrollment status to Enrolled?

1. Click the pencil on the Client Home page to get to the Client Status and Contact Changes page.
2. Scroll to the top of the new screen to the "Client Program Status/Level Change" area.

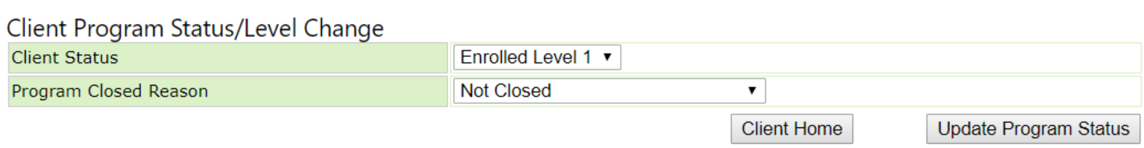


3. Change the Client Status to "Enrolled Level 1" or "Enrolled Level 2" and click "Update Program Status".
4. Once completed, you will be returned to the Client Home Page and should see the level and enrollment status changed.

How do I change a client's enrollment status to "Closed"?

NJCHART only allows supervisors to close an enrolled client. When logged into the system:

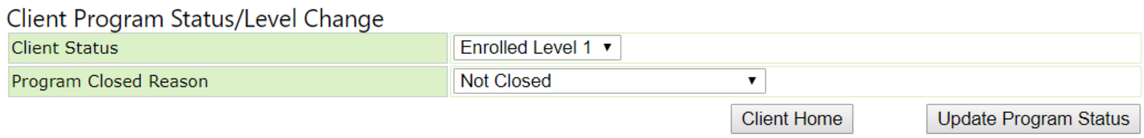
1. Use the Client Search feature to locate the desired client record and select that client to get to the Client Home page.
2. Supervisors should click the pencil on the Client Home page to get to the Client Status and Contact Changes page.
3. Scroll to the top where you will see "Client Program Status/Level Change."



4. Change the Client Status to "Closed No Level"
5. Select a Program Closed Reason. If you choose one of the Return to Hub options, the client will be returned to Central Intake.
6. Click "Update Program Status".
7. You will be returned to the Client Home Page and should see the enrollment status changed.
8. Closing a client in NJ-CHART also closes a client in SPECT.

How do I change a client's enrollment level after the client is enrolled?

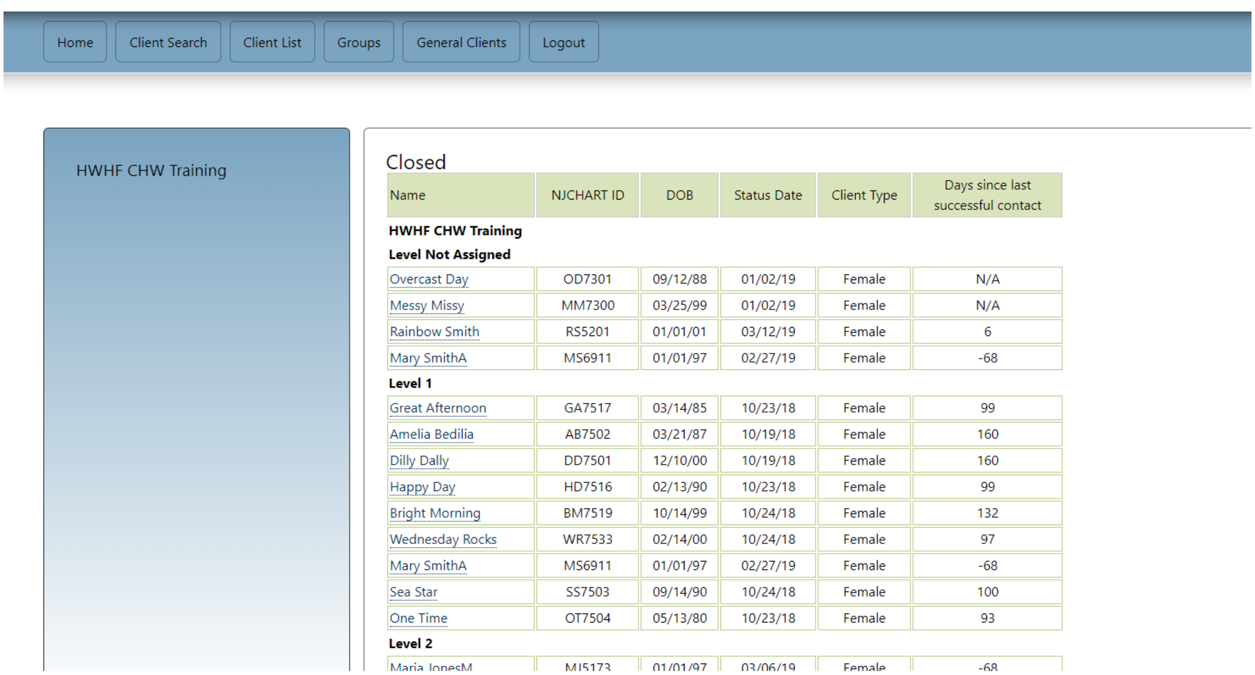
1. NJCHART only allows supervisors to change a client's enrollment level once a client is enrolled.
2. Supervisors should use the Client Search feature to locate the desired client record and select that client to get to the Client Home page.
3. Click the pencil on the Client Home page to get to the Client Status and Contact Information changes page
4. Scroll to the top where you will see "Client Program Status/Level Change."



5. Select the new level in Client Status and click "Update Program Status".
6. You will be returned to the Client Home Page and should see the level changed.

Will a closed client's information still display in SPECT and NJCHART?

1. Clients should only be closed in NJCHART.
2. When a client is closed in NJCHART, the client will also be closed in SPECT.
3. A closed client's information will still be visible in NJCHART under the closed client search list. To see a list of closed clients, select "Closed" as the status when you use the Search function.
4. Click on the client's name to access the client's information.

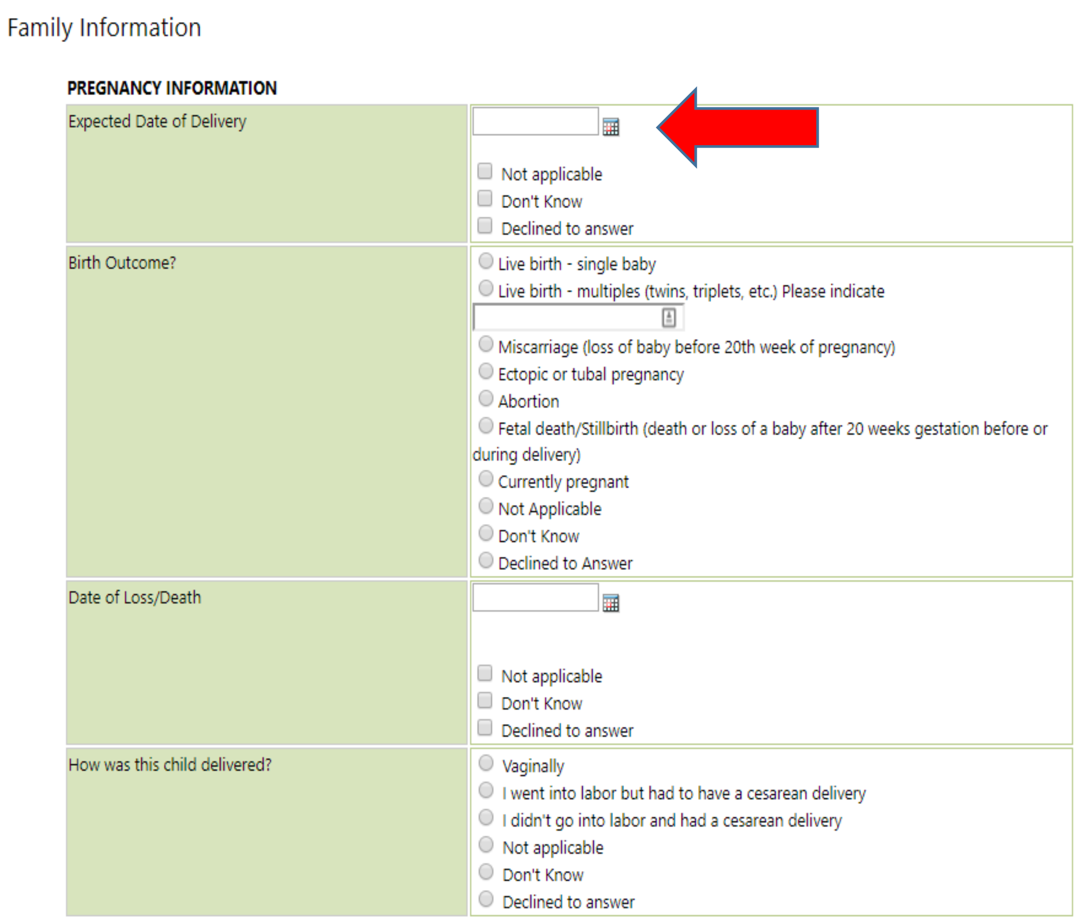


Name	NJCHART ID	DOB	Status Date	Client Type	Days since last successful contact
HWHF CHW Training					
Level Not Assigned					
Overcast Day	OD7301	09/12/88	01/02/19	Female	N/A
Messy Missy	MM7300	03/25/99	01/02/19	Female	N/A
Rainbow Smith	RS5201	01/01/01	03/12/19	Female	6
Mary SmithA	MS6911	01/01/97	02/27/19	Female	-68
Level 1					
Great Afternoon	GA7517	03/14/85	10/23/18	Female	99
Amelia Bedilia	AB7502	03/21/87	10/19/18	Female	160
Dilly Dally	DD7501	12/10/00	10/19/18	Female	160
Happy Day	HD7516	02/13/90	10/23/18	Female	99
Bright Morning	BM7519	10/14/99	10/24/18	Female	132
Wednesday Rocks	WR7533	02/14/00	10/24/18	Female	97
Mary SmithA	MS6911	01/01/97	02/27/19	Female	-68
Sea Star	SS7503	09/14/90	10/24/18	Female	100
One Time	OT7504	05/13/80	10/23/18	Female	93
Level 2					
Maria JonesM	MJ5173	01/01/97	03/06/19	Female	-68

Family Information page

How do I enter a pregnancy if the Expected Date of Delivery (EDD) is not currently listed on the Family Information page?

1. Select the plus sign at the top of the Family Information page.
2. In the new form, simply enter the woman's EDD



Family Information

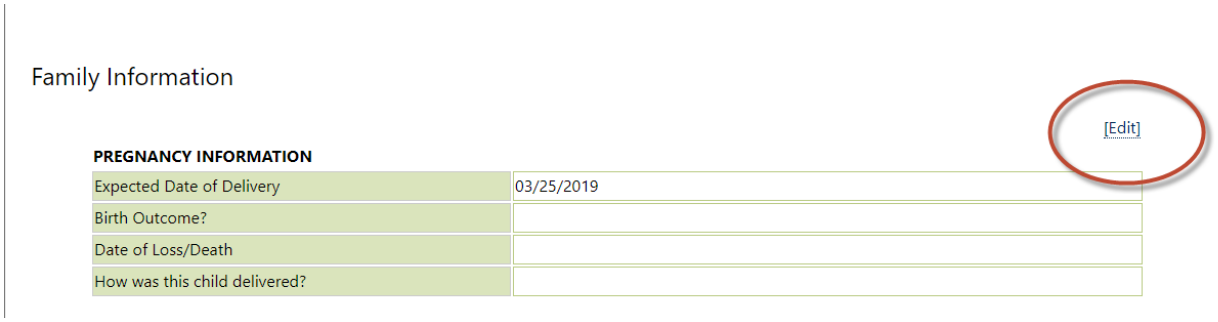
PREGNANCY INFORMATION

Expected Date of Delivery	Not applicable Don't Know Declined to answer
Birth Outcome?	Live birth - single baby Live birth - multiples (twins, triplets, etc.) Please indicate Miscarriage (loss of baby before 20th week of pregnancy) Ectopic or tubal pregnancy Abortion Fetal death/Stillbirth (death or loss of a baby after 20 weeks gestation before or during delivery) Currently pregnant Not Applicable Don't Know Declined to Answer
Date of Loss/Death	Not applicable Don't Know Declined to answer
How was this child delivered?	Vaginally I went into labor but had to have a cesarean delivery I didn't go into labor and had a cesarean delivery Not applicable Don't Know Declined to answer

3. Select Save at the bottom of the form.

How do I change an EDD that is entered incorrectly?

1. On the Family Information page, click on the EDD for the pregnancy.
2. When the form opens, select Edit in the upper right-hand corner.
3. Enter the correct EDD on the right of the prompt.
4. Select Save at the bottom of the form.



Family Information

[Edit]

PREGNANCY INFORMATION

Expected Date of Delivery	03/25/2019
Birth Outcome?	
Date of Loss/Death	
How was this child delivered?	

Do all children in the family need to be entered into the Family Information page?

Only children under the age of 5 need to be entered into the Family Information page.
You are able to enter children over 5 in the Family Information section for client management purposes. However, you are not required to complete an assessment on children over 5.

Does the order in which children are entered into the Family Information page matter?

No: children can be entered in any order convenient for the CHW.

How do I create a Family Information page entry for a child who was born prior to enrollment in the program?

1. Select the plus sign at the top of the Family Information page.
2. In the new form, skip the Pregnancy Information section and simply complete the Child Information section.
3. Select Save at the bottom of the form.

After a child is born, how do I enter the pregnancy outcome and information about the new child on the Family Information page?

1. On the Family Information page, click on the EDD for the pregnancy.
2. When the form opens, select Edit in the upper right-hand corner.
3. Complete the Pregnancy Information section and then the Child Information section.
4. Select Yes to indicate the record is completed.
5. Select Save at the bottom of the form.

If twins are born, how do I enter the pregnancy outcome and information for the new children?

1. On the Family Information page, click on the EDD for the pregnancy.
2. When the form opens, select Edit in the upper right-hand corner.
3. Complete the Pregnancy Information section and then the Child Information section with information about one of the twins.
4. Select Save at the bottom of the form
5. Select the plus sign at the top of the Family Information page.
6. In the new form, enter the woman's EDD again and complete the Pregnancy Information section and then the Child Information section with information about the other twin.
7. Select Save at the bottom of the form

Assessments page

When I get to the Assessments page, why can't I immediately open the Baseline Assessment?

When you get to the Assessments page, you will first be required to enter the Pregnancy Supplement, Postpartum Supplement and Child Under 5 Supplement if any are due. Once they are complete, you will be able to select the Baseline Assessment and complete it.

Should I update information in the Baseline Assessment after it is completed?

You can correct errors in the Baseline Assessment after it is completed, but you should not update the information to reflect changes in the client's status.

What do I do when forms that I have already completed appear in the Baseline or Six-Month Assessment?

If you have recently completed the form, simply enter the date at the top and select, "Yes, I am finished completing this information".
If you completed the form at an earlier point in time, update any information with the client before entering the form as complete.

Can I save a partially completed assessment form?

Yes: whenever needed, select the "No, I will return and complete this information at a later time" option in the "Completion Confirmation" section at the bottom of each assessment form.

If I open an existing assessment form to review it but do not change anything, should I select one of the completion confirmation options at the bottom of the page and click the Submit button?

No: if you have made no changes, select the Assessments button at the top of the page to return to the Assessments page.

How should I update a woman's entry to prenatal care date in NJCHART?

1. If a woman has not had an initial prenatal visit when the Pregnancy Supplement is originally completed, after you complete the form you will see a note in red indicating that the visit has not been logged.
2. When you check back with the woman and learn that the visit has occurred, reopen the Pregnancy Supplement and enter the date where it asks, "Date Initial Appointment Attended." Do not worry if "Not Applicable" is still selected.
3. Once the form answers are saved, the note will disappear from the assessment screen.
4. If the pregnancy is lost prior to the woman attending a prenatal visit, select "No Prenatal Appointment Required" and the note in red will disappear after you save the form.
5. Do not update the information in the Baseline or Six-Month Assessments, only in the Pregnancy Supplement itself.

How should I update a woman's postpartum visit date in NJCHART?

1. If a woman has not had a postpartum visit when the Postpartum Supplement is originally completed, after you complete the form you will see a note in red indicating "Needs Postpartum Appointment".
2. When you check back with the woman and learn that the visit has occurred, reopen the Postpartum Supplement and enter the date where it asks, "Date Appointment Attended." Do not worry if "Not Applicable" is still selected.
6. Once the form answers are saved, the note will disappear from the assessment screen.
3. If too much time has passed and the postpartum appointment has not occurred, select "Too Late for Postpartum Visit " and the note in red will disappear after you save the form.
4. Do <u>not</u> update the information in the Baseline or Six-Month Assessments, only in the Postpartum Supplement itself.

Contacts, Referrals, and Education

Will contacts and referrals previously logged in SPECT show up in NJCHART?
Yes: any contacts and referrals logged in SPECT will also show up in NJCHART.

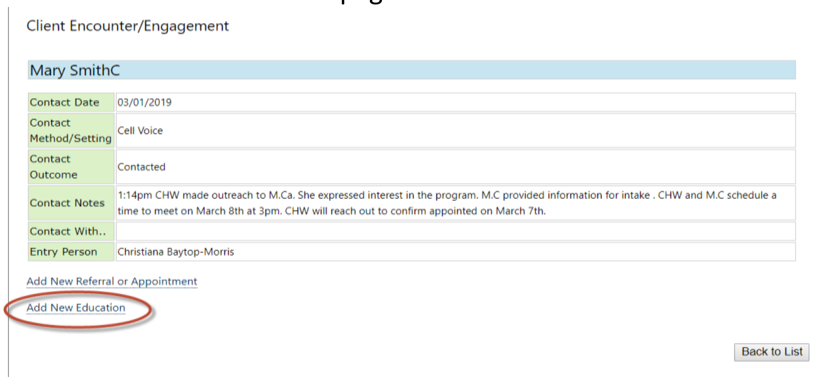
If I have multiple contacts (or contact attempts) with a client on the same day, should I log them all separately in NJCHART?
Yes: each contact attempt should be logged separately

How do I log a new referral?
1. You must first create and save a new contact or open an existing contact by clicking on the contact date.
2. After you click “Save Contact”, you will be able to click on “Add New Referral or Appointment”
3. For “Date”, select the date you are making the referral
4. You can select a related family member, but it is not required.
5. Select the Type of referral/appointment, the Program, and the Provider
6. For Status, select “Open” and then click “Save” at the bottom of the screen.

How do I enter an outcome for a referral made in NJCHART or SPECT?
1. Click on the Contact Date with the open referral/appointment. (A contact with an open referral or appointment will be highlighted in pink.)
2. Find the referral and click on the pencil in the upper right-hand corner.
3. Change the Status to Closed
4. Select an Outcome
5. Enter the date you learned the outcome as the Outcome Date
6. If the referral or appointment was not successful, identify a Reason/Barrier.
7. Add any notes and click the Save button.

How do I log education in NJCHART?

1. You must first create and save a new contact or open an existing contact by clicking on the contact date.
2. After you click “Save Contact”, you will be able to click on “Add New Education”
3. Select the Patient Type and then the Child (if the education is directly tied to a child)
4. You can select a related family member, but it is not required.
5. Select the Education Category.
6. Indicate whether the Education occurred via handout or via conversation andclick the “Save” button at the bottom of the page..



BIM Services Page

What referrals should be logged on the BIM Services page?

Regions vary in terms of what BIM Services they are contracted to provide. The BIM Services page will allow you to log referrals to Doula or Centering programs and Fatherhood or Breastfeeding groups based on their availability in your region. (For regions with no BIM Services, this page does not appear on the screen.)

If I log a referral on the BIM Services page, will it automatically create a service referral?

When you log a referral on the BIM Services page, it does not create a service referral. It merely tells DOH that a client was referred to one of the BIM programs. The BIM Services page collects additional information from the HWHF program that allows DOH to track whether the client ultimately participated in the program and to what degree.

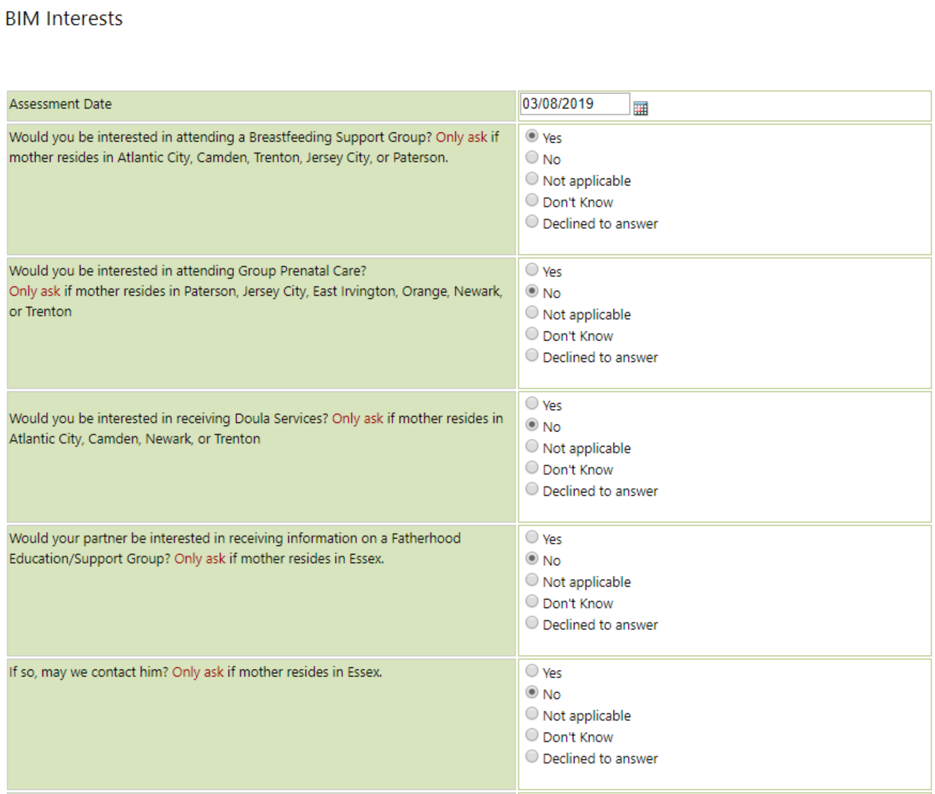
You do NOT need to create a separate service referral when referring a participating woman to your BIM program for DOH purposes, but if it facilitates your communication with the program, you can do so.

Will all BIM services show up on the BIM Services page, regardless of what services the program offers?

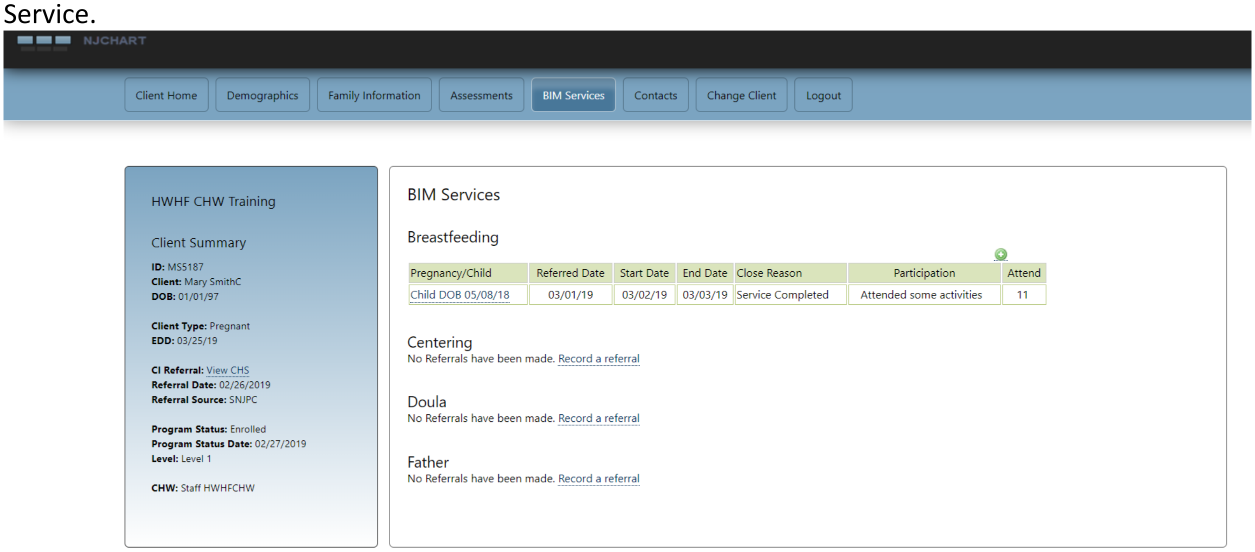
Only the BIM services that the program offers should show up on the BIM services page.

What is the difference between the BIM Interest section of the Baseline Assessment and the BIM Services page?

The "BIM Interest" section of the assessment is an on-screen reminder for CHWs to ask about a client's potential interest in BIM Services offered in her municipality.



The BIM Services page is used to log the referral and participation of interested women into a BIM Service.



Groups

How do I access Groups when I am in a client's record?

To see Group information, exit the client's record by clicking "Change Client" at the top of the screen. From there, you can click on Groups in the top menu.

Will any supervisor or CHW associated with a program be able to view a created group in NJCHART?

Yes: any program staff with NJCHART access will be able to view that program's created groups in NJCHART.

Which types of BIM services must be logged using the Groups section of NJCHART?

Participation in Breastfeeding and Fatherhood groups must be captured in the Groups section of NJCHART.

Can programs use the Groups section of NJCHART to log participation in non-BIM activities or workshops they offer?

Yes, but they should select "Other" rather than "Breastfeeding" or "Fatherhood" in the pulldown menu for Topic of Group.

Reminder! Please send comments and questions to NJCHART@fhiworks.org