



CFY Online Data Entry System Guidance

1. Make sure you format dates in *mm/dd/yyyy* format. Two digit years convert to 1912 and cause issues.
2. Do not double-click on buttons.
3. Do not use the back arrow in the browser.
4. When searching for a client, you must type in First Name, then Last Name. If you type in a complete name, but spell it differently than it is actually spelled, the client may not be found. Therefore, it is always best to do a search by birth date if possible.
5. Remember to go to the “Reports” menu to view important reports such as forms saved, but not yet submitted, missing forms, comprehensive screenings with missing Ht, Wt, and or BP.
6. Remember that forms must be **submitted**, not just saved in order to be vouched. Forms must be submitted by 11:59 pm the last day of the month to be processed for that month’s vouching.
7. Client transfers need to be requested by the 25th of each month to allow time for processing.
8. Clients transferring into a program with an old client # already being used for a client in the new program will have old client # set to 0.
9. Only one Screening form can be marked as comprehensive and submitted per enrollment year. Therefore, if one comprehensive Screening form is already saved, you can’t create and submit another comprehensive form. Please complete and submit the original saved form.
10. If a Laboratory Assessment form is linked to a saved or submitted comprehensive Screening form, the Laboratory Assessment form must be deleted before changing the Screening form to limited or before deleting the Screening form. If not, the link will be lost and there will be an orphan Laboratory Assessment form in the database.
11. If a diagnostic form is linked to a saved or submitted Screening form, the diagnostic form must be deleted before changing the work up plan from yes to no on the Screening form. If not, the link will be lost and there will be an orphan diagnostic form in the database.
12. New Enrollment forms need to be at least 330 days from the last enrollment in order to be created.
13. PDCRS with corrected hard copies of forms need to be completed and **mailed** to edit data and do data cleanup on forms with screening visit dates prior to 7/1/2011 or to edit data for enrollment forms with enrollment dates prior to 7/1/2011. Any changes to Lifestyle Assessment forms prior to the current version 7.2012 need to be done using the PDCR process as well.
14. Contact CPHS to edit first name, maiden name, middle initial, and birth date, to avoid client information being accidentally overwritten with another client’s information.
15. Contact CPHS to edit an enrollment date to avoid date validation issues with linked forms.

NOTE: Currently, all of the functionality for editing and deleting forms with key dates after 7/1/2011 that you normally should be able to do on the website is not quite in place. You will be notified when you will be able to do this as expected.