Virginia Department of Health

LISSDEP Monthly Reporting

Low Income Safety Seat Distribution and Education Program

Software Release 2.5.2

9/14/2022

Table of Contents

Document History

Revision History:

Numbering convention: Version. Revision as n.xx. Pre-publication drafts are 0.xx; first published version is 1.00; for minor revisions to a published document, increment the decimal number (ex. 1.01); for major content upgrades to a published document, increment the leading whole number (ex.2.00).

Revision	Date	Description
1.00	8-1-2016	Initial release.
1.001	8-2-2016	Grammar, spelling corrections; password information update.
1.01	8-16-2016	Updated to reflect additional features for the Dashboard and Reports. Updated graphics of LISSDEP web pages. Some text reformatting. Corresponds with software release 1.01.
1.02	8-31-2016	Release 1.02; new report for VDH managers
1.021	9-7-2016	Update Dashboard documentation for tracking form editing functions.
1.022	9-2-2016	Update documentation for new reports.
1.2	10-11-2016	Update documentation for release 1.2.
2.0	7-1-2018	Updated documentation for release 2.0
2.1	7-26-2018	Updated documentation for release 2.1
2.2	11-6-2019	Updated documentation for Release 2.2
2.3	4-1-2019	Updated documentation for Release 2.3
2.4	2-23-2021	Updated documentation for Release 2.4
2.4.5	8-15-2021	Software update to address security vulnerabilities; no software changes.
2.4.8	2-28-2022	Updated documentation for Release 2.4.8; add controls to make sure the Calculate/Recalculate process has been run prior to submission.
2.5.2	9-14-2022	Updated to specify new password length (8 to 14 characters).

Introduction

The LISSDEP reporting process has changed effective July 1, 2018. The major changes are:

1. Distribution Sites will now report application and application review information by parent/child.
2. Distribution sites will now report specific seat inventory transactions.
3. Distributions sites will now be able to summarize the information (entered above) for their monthly reporting. (Totals for the monthly tracking report are calculated, not entered.)

As a result of now entering specific parent application information, additional features have been added to LISSDEP to better protect this personal/sensitive information. These security-related changes will primarily impact users who do <u>not</u> have email addresses that end with @.vdh.virginia.gov.

<u>IMPORTANT:</u>
LISSDEP can be accessed by individuals who are VDH staff (employees or contractors) and by non-VDH staff.

If you have an email address that ends with @.vdh.virginia.gov, in LISSDEP, you are considered a <u>COV</u> (Commonwealth of Virginia) <u>user</u>. To access LISSDEP, you enter the same VDH email address and password as you use to log on to your computer when you start or restart your computer. If you change your COV password, that new password is used to access LISSDEP.

If you have an email address that does NOT end with @.vdh.virginia.gov, you are considered a <u>Password user</u>, meaning that LISSDEP manages your logon and password. For Password Users, those changes include:

1. User passwords have to be changed every 90 days (this time may soon change to 42 days, based on proposed Commonwealth of Virginia security regulations).
2. Users have the ability to reset their passwords when they expire or at any time (using Forgot Password or Reset Password features.
3. Users are required to set up security questions that are used during “forgot password” process.
4. If a user does not logon for 90 days, their account is deactivated.
5. Users must acknowledge the system access agreement every year (during logon process).

This document provides information for how you can access the electronic reporting system and enter the required information. LISSDEP is accessed via a web browser such *as Internet Explorer, Firefox or Chrome.* The web address for the LISSDEP Reporting system is below. In order to access the reporting system, you will need a user id and password which is obtained through your manager and approved by the VDH LISSDEP office. (Please check with you manager on how to request a LISSDEP account).

LISSDEP Status Definitions

There are five statues for the monthly tracking form report:

1. DRAFT
    a. When a new Tracking Form monthly report for a site is created, its status is *Draft*.
    b. A Tracking Form remains in *Draft* status until all data have been entered, the **Submit** button is clicked and there are no edit errors.
    c. During the review and approval process, a tracking form can return to the Draft Status if the reviewer finds errors that require corrections by the reporting site
2. SUBMITTED
    a. When a distribution site has completed work on a tracking form in Draft status (either a new form or form returned by reviewers), they click the Submit button at the bottom of the tracking form and if there are no errors detected, the status is changed from *Draft* to *Submitted*. A message displays indicating the change.
3. LHD APPROVED
    a. A health district LISSDEP manager is responsible for reviewing all tracking forms submitted by sites in the district(s) for which they have oversight responsibility.
    b. A health district LISSDEP manager is able to see all tracking forms (for sites for which they are responsible) in a *Submitted* status on the Dashboard.
    c. A health district LISSDEP manager reviews each site tracking form in *Submitted* status.
    d. If a site tracking form report is satisfactory, the health district LISSDEP manager approves and the status changes from *Submitted* to *LHD Approved*. If the site tracking form is not satisfactory, it is disapproved and the status changes from *Submitted* to *Draft* (and the site is again responsible for editing and re-submitting).
4. STATE REVIEW
    a. VDH LISSDEP managers are responsible for reviewing tracking forms approved by all health district LISSDEP managers in the state.
    b. A VDH LISSDEP manager is able to see all tracking forms in a *LHD Approved* status on their Dashboard.
    c. A VDH LISSDEP manager reviews monthly tracking forms in *LHD Approved* status.
    d. If site tracking form is satisfactory, the VDH LISSDEP manager approves and the status changes from *LHD Approved* to *State Approved*. If tracking form is not approved, the VDH LISSDEP manager determines the nature of the problem and may change the status from *LHD Approved* to *State Review* or *LHD Approved* to *Draft*. Tracking Forms on *State Review* may subsequently be changed from *State Review* to *State Approved* or *Draft*. (Tracking forms on *Draft* status become the site's responsibility for editing and re-submitting.)
5. STATE APPROVED
    a. *State Approved* is the *final* status for each site's monthly tracking form.
    b. A site may <u>not</u> begin work on a new month's tracking form until the prior month's form has a status of *State Approved*.

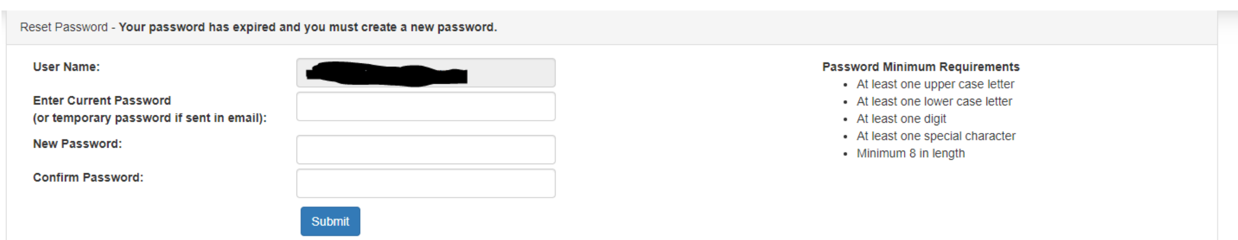
How to Obtain a User Account to Access LISSDEP

1. Click here: Low-Income Safety Seat Distribution and Education Coordinators - Resources and Forms
    a. Contact Marcia Franchok-Hill for logon information if needed
2. Select LISSDEP Access Request Form.
    a. Read Page 1 LISSDEP Security Access Agreement with VDH.
    b. Go to Page 2 and enter the information requested.
        i. Make sure you provide your full name, job title, phone number, supervisor's name and email. (You email address should be your "work email address", not a personal email address.)
        ii. Make sure you designate your Program Site Name(s) and Health District.
        iii. Always check "New User" to establish an account.
            1. Your role should always be *Reporter.*
    c. Print completed form.
    d. Print and sign you name (you are USER).
    e. Submit signed form to your LISSDEP District Coordinator for approval.
3. When request has been fully approved, your user account will be created and you will receive an email with logon information and, for "Password users", a second email with a temporary password like below.

Subject: Automated Email: LISSDEP Reset Password

Your initial password: **xxxxxxxx**
Please change your password as soon as you can. This initial password will be expired in 24 hours.

4. You must logon to the LISSDEP system within 24 hours after receiving the temporary password. During the logon process, you will be required to create a new password. (The current password


Reset Password - **Your password has expired and you must create a new password.**

User Name: [redacted]
Enter Current Password (or temporary password if sent in email):
New Password:
Confirm Password:
Submit

Password Minimum Requirements
- At least one upper case letter
- At least one lower case letter
- At least one digit
- At least one special character
- Minimum 8 in length

5. After creating a new password, you must select and create answers to security questions. See below.
6. If you have problems completing this form, contact you LISSDEP district coordinator.

Passwords and Password Information (PASSWORD USERS ONLY)

Passwords, along with your user identification provide access to the LISSDEP application. The LISSDEP application has a number of controls related to passwords -- length, complexity and how often they must be changed. Here are some things you should know:

- Password: (9/15/2022 change)
  - *at least 14* characters long and must use *at least 3* of the following attributes:
    - Special characters – like! @ # $ % ^ & * ( ) .
    - Alphabetical characters
    - Numerical characters
    - Combination of upper case and lower case letters
  - For example: 4ngH0)3kTZ%26d is acceptable; 4ngh03k51dfDD is not acceptable.
- Password must be changed every 90 days; you will receive a notice to change your password prior to expiration; if you attempt to logon and your password has expired, you will be required to change it (by providing your old password and a new one, entered twice for confirmation).
- Passwords cannot be reused for 24 changes.
- When your account is first established, you will receive a temporary password. At the time you first logon to LISSDEP, you will be required to change your password. The temporary password must be changed within 24 hours of receipt. If the temporary password expires, contact the VDH Help Desk at 804/864-7200, Option 2.
- You have 3 attempts to correctly enter your password at login. If you enter it incorrectly, you will receive an error message (always check your user id to make sure it is entered correctly!) After the third attempt, you logon account will be temporarily locked for 15 minutes.
- You may only change your password one time in a 24 hour period.
- As you know, you should never share a password with anyone. If you have reason to believe that someone may know your password, change it immediately.
- Contact the VDH Help Desk for assistance at 804/864-7200, Option 2.

If you are a COV user (have a "vdh.virginia.gov" email address), contact the VCCC (866-637-8482) to resolve password problems.

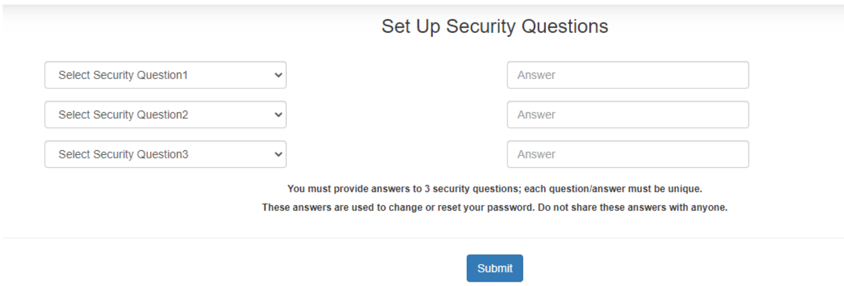
LISSDEP Security Questions (PASSWORD USERS ONLY)

Starting July 1, 2018, all external LISSDEP users (users with email addresses the do NOT end with @vdh.virginia.gov) must select 3 security questions and provide answers to those questions. Users will be prompted to answer these questions during the logon process. The user will be required to provide answers to one (or more) of these questions for password changes.

If you cannot remember answers to your security question, contact the VDH Help Desk. The Help Desk will reset your account and you will have to change your password and select new security questions (and answer) when you next logon to LISSDEP.

Hint: the best answer to security questions are answers that are not accurate (not truthful). These are the best answers as long as you can remember them. Accurate answers are easier to remember but someone who knows you can more easily guess the answers.

The Security Question set page looks like below. Select 3 questions from the dropdown list on the left side and provide 3 answers on the right side.



LISSDEP ACCESS AGREEMENTS (PASSWORD USERS ONLY)

All LISSDEP users are required to accept a user access agreement at the time they are granted access to LISSDEP and annually thereafter. Each year, the LISSDEP Access Agreement document is displayed to Password users during the logon process the must be accepted by the user. (COV users provide this acceptance as a part of their annual security training requirement.)

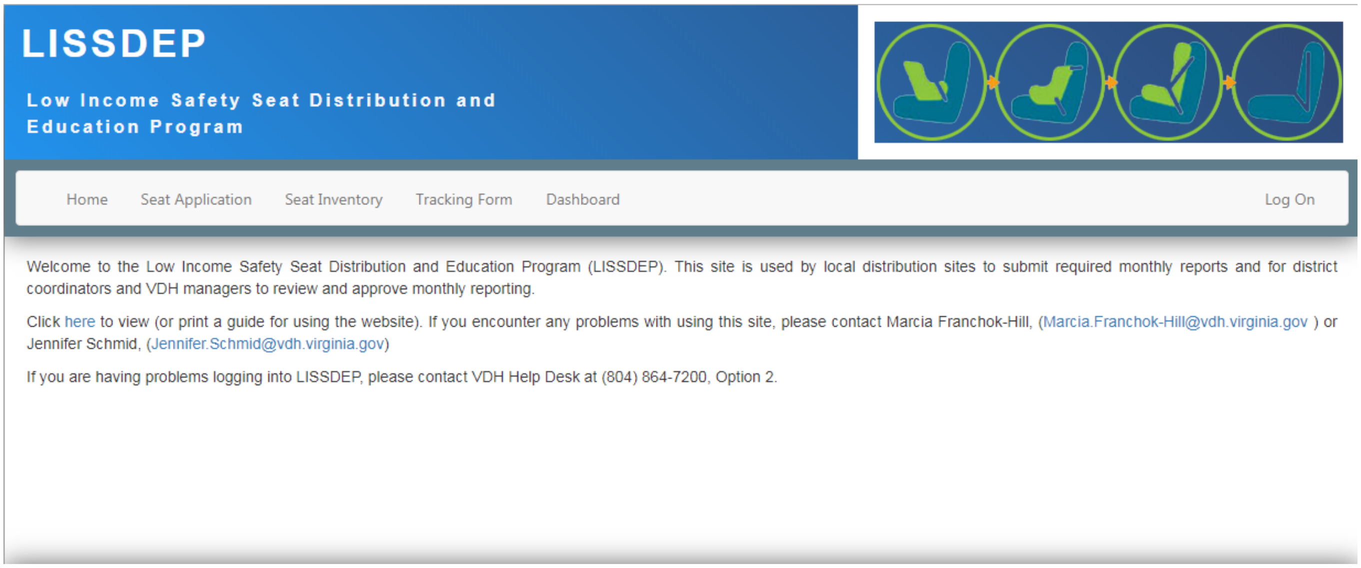
Monthly Reporting and Recommended Process for Distribution Sites

1. When your LISSDEP monthly tracking report for the month has been "State Approved" (email received), create a draft tracking report for the current month.
2. Enter (into LISSDEP) the seat application and application review information on a daily basis (when applications occur)
3. Enter (into LISSDEP) the seat inventory transactions on a daily basis (when they occur).
4. Enter (into LISSDEP) training classes and promotional events (when they occur)
5. On or about the end of the month (or any time during the month):
    a. Perform the ***LISSDEP Calculate/Recalculate Form Totals*** process.
    b. Review the summarized data.
    c. Determine if there are missing/inaccurate detail data entered.
        i. Go to the Application and Seat inventory web pages and correct/enter as needed.
    d. Repeat this process as many times as needed until all monthly detail data have been entered and the data verified.
        i. Ending inventory should equal the number of each seat type on hand at the end of the month (physical inventory).
        ii. Type of instruction provided should match what actually occurred.
        iii. Missed training, waiting list and reasons applications denied should equal what actually occurred.
        iv. Training classes and Promotional events should reflect what actually occurred.
6. When the summarized data have been verified:
    a. Certify the ending inventory on the tracking report (with physical inventory) on Inventory Summary section of tracking Form.
    b. Provide Name of VDH approved agency serving as Safety Seat Check Station and Refer to Website on Instructional Summary section of Tracking Form
    c. Perform ***Submit Tracking Form.***

7. After monthly tracking form is submitted:
    a. The District Coordinator reviews and approves (or denies).
    b. The VDH LISSDEP office reviews and approved (or denies).
    c. Respond to any question/issues about the tracking form submitted from the District Coordinator or the VDH LISSDEP office. (This may involve having to change the data you reported and resubmitting.
8. When submitted tracking form status is STATE APPROVED, the process is complete.

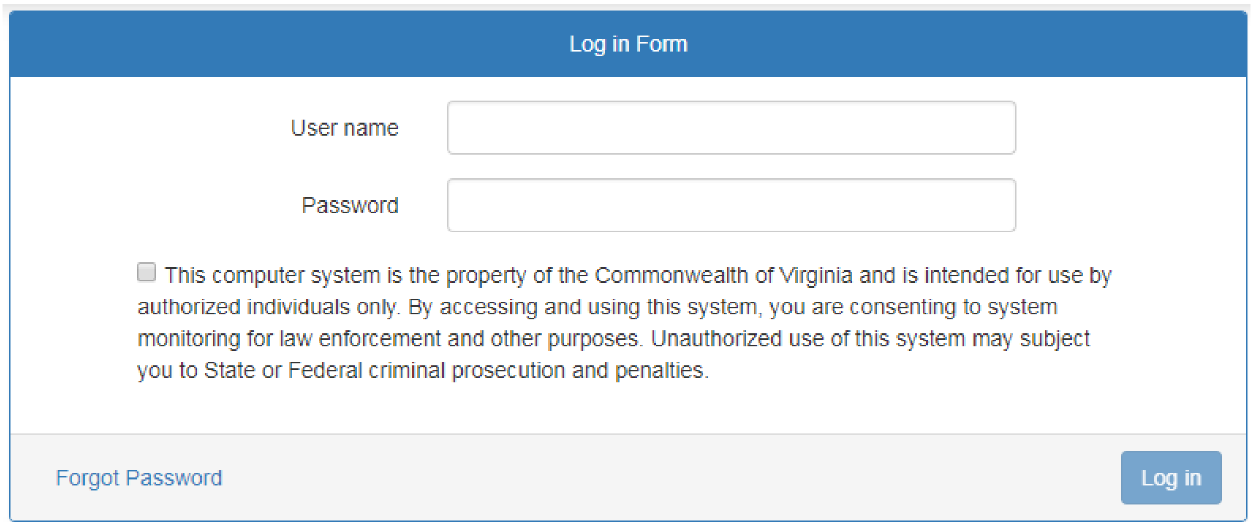
How to Access the LISSDEP Website

1. To access the monthly electronic reporting form, open you web browser and enter www.vdh.virginia.gov/LISSDEP as the web address. (You may want to bookmark this, too.)
2. The following page will display:



How to Log On to LISSDEP

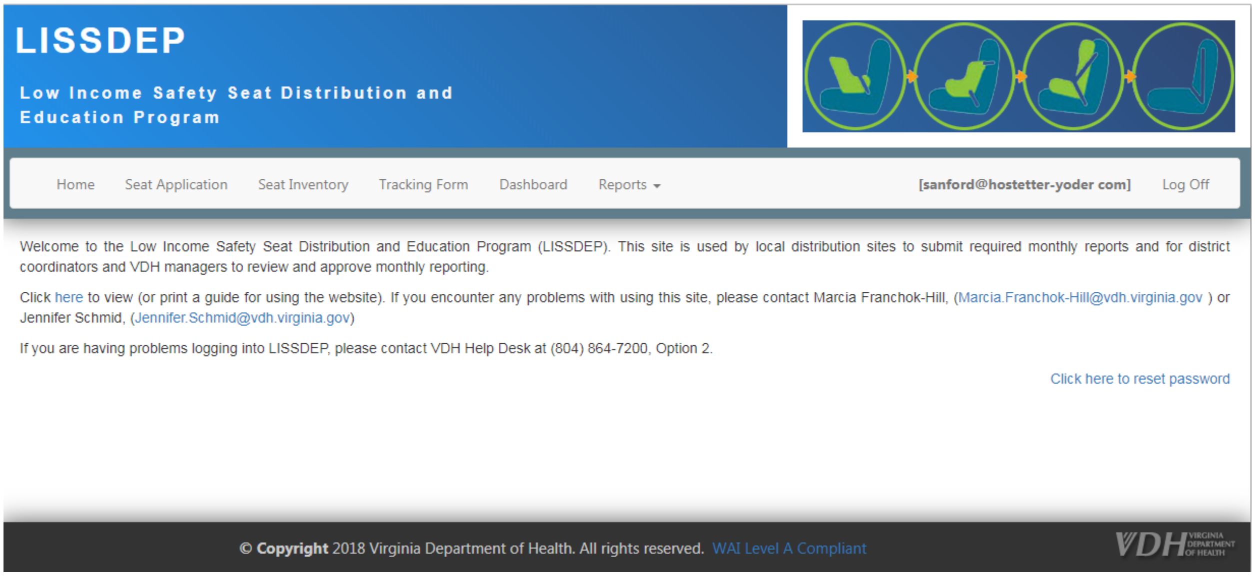
1. Click Log On (upper right of page)
2. The Log in Form will display:



3. Enter your assigned user id and password; click on Log in to access the electronic reporting form. <u>This is your email address and related password.</u>
4. Click on check box to acknowledge the statement. (A check mark ☑ will display.) <u>Note: you cannot log on to LISSDEP unless you there is a check mark ☑ in this box.</u>
5. Click on Log in.
6. For Password users only:
    a. If you cannot remember your password, click on Forgot Password. You will be requested to enter your email address. If valid, you will receive an email with a link to for setting a new password. You will be required to provide an answer to one of your security questions.

The LISSDEP Home Page

1. After logging on, the LISSDEP Home page displays:



There are 7 functions available on the Home Page:

- **Home** is the Home Page listed above. There is a link for a reference guide and critical contact information. There is also a Reset Password link
- **Seat Applications –** Access to multiple web pages that allow entry/update of safety seat application information for current reporting month and the ability to review statewide safety seat application information (starting 7/1/2018).
- **Seat Inventory** – Access to web page that permits the entry/update od seat inventory information for current reporting month and the ability to review site inventory transactions (starting 7/1/2018).
- **Tracking Form** – this is where you can summarize detail data for current reporting month, view summarized reporting month data (Inventory, Demographic, Instructional Application), enter/update current reporting month training classes, enter/update current reporting month promotional events and submit draft monthly tracking report. You may also view all tracking reports for the a distribution site (with detail starting 7/1/2018).
- **Dashboard** – This is where you can find:
  - The *Draft(s)* of monthly tracking form(s) for <u>your site(s)</u> – these are the Tracking Form(s) “Saved”.
  - The *Submitted* monthly tracking form(s) for you site(s). These are tracking forms awaiting your district coordinator’s approval.
  - The *LHD Approved* tracking form(s) for your site(s).
  - The monthly tracking forms that are either *State Approved* (closed) or in *State Review*.
- **Reports** – provides a mechanism to create a summary report of safety seat data submitted. Filters are available to specify time periods and distribution site(s).
- **Logoff** – This ends your LISSDEP session.

Your ***user id*** also is displayed on the home page.

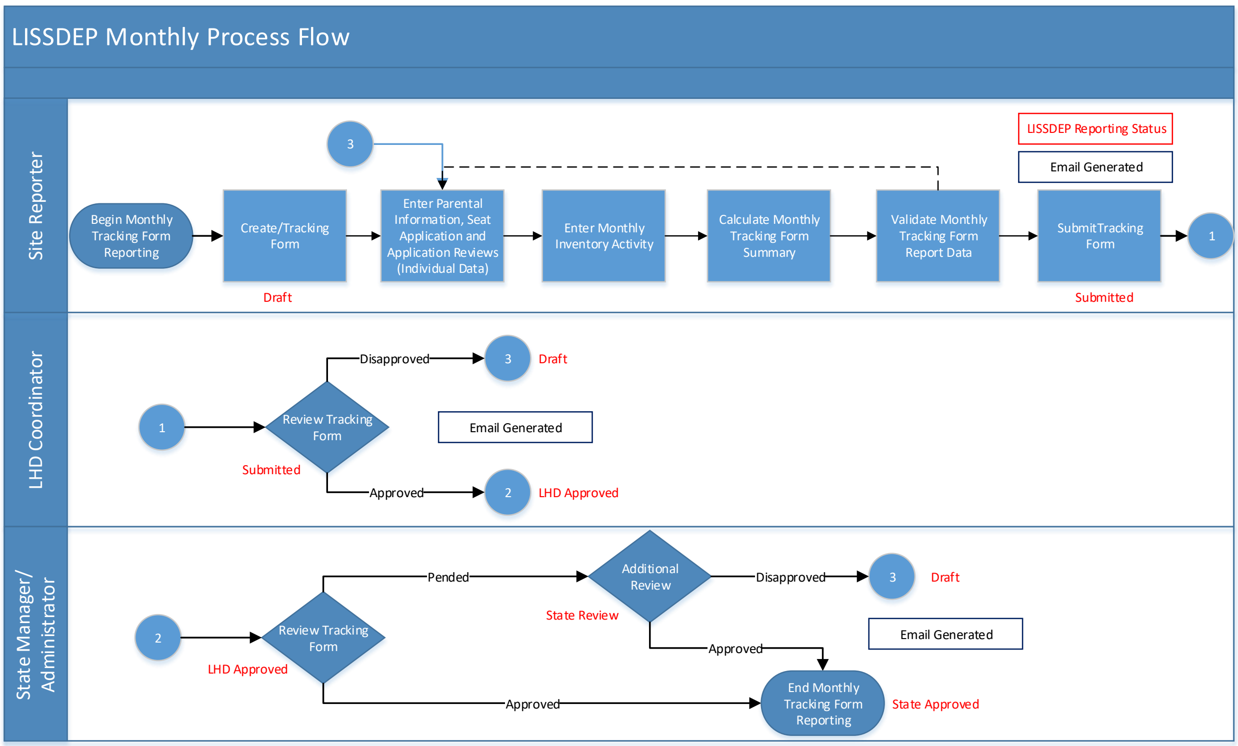
For Password users only , there is also a link to reset password. If you click, you will be requested to enter your old password, then a new password (2 times).

Detail information for each of the LISSDEP functions are provided in the manual.

The LISSDEP Reporting Process

Monthly reporting is performed by each distribution site. The reporting month goes from the first day of the month to the last day of the month. Monthly reports are due in Central Office by the 10th working day of the [next] month. Each time an electronic monthly report is submitted, approved or disapproved, an email is generated to all related parties indicating the changed status. Only one monthly report may be in progress at any time; a distribution center may not begin work on the next month's report until the prior month's report has been fully approved.

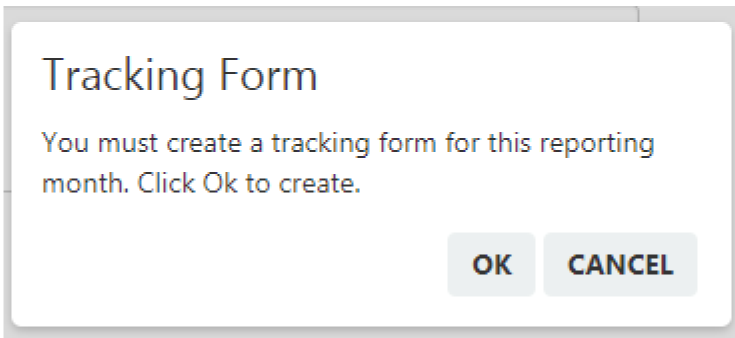
The LISSDEP reporting process is summarized below.



Create Tracking Form (Create Draft Monthly Tracking Form)

At the beginning of each reporting month, a distribution site user must create a draft monthly tracking forms before other monthly reporting activities can be performed. A draft monthly tracking form can be created only after the monthly tracking form from the prior month has been “State Approved). After receiving an email indicating prior month’s tracking report was “State Approved”. To create a new monthly tracking form:

1. Logon to LISSDEP
2. Click on Tracking Form tab.
3. The Tracking Form web page displays.
4. A message displays indicating a tracking form for the current reporting month must be created:



5. Click OK to create a new tracking from (draft status).
6. A message will appear indicating a new tracking form was created.
7. You may now add seat applications and inventory transactions.

<u>This activity is performed only one time per reporting month.</u>

Safety Seat Applications

There are 6 web pages related to seat applications:

- **Find Parent Guardian** – Search the LISSDEP database for the parent/guardian who submits the safety seat application; display possible matches.
- **Parent/Guardian Information** – provide address, telephone, residency information of the parent/guardian who submits the safety seat application.
- **Related Parent/Guardian Information** – provide information about person(s) related to parent/guardian who submits safety seat application.
- **Safety Seat Application Dashboard** –displays parent/guardian safety seat application(s)
- **Safety Seat Application** – detail for a specific safety seat application
- **Application Review** – detail for safety seat application actions (eligible, not eligible and actions).

Safety Seat Application General Information

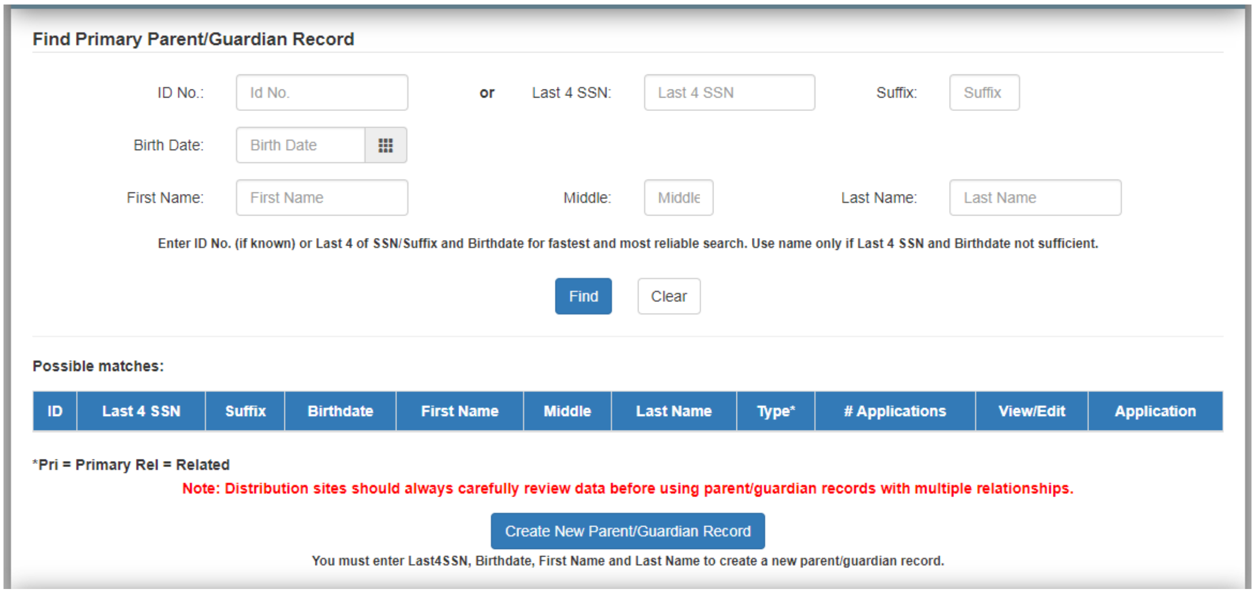
1. The LISSDEP parent/guardian database is shared by all distribution sites statewide.
2. A parent/guardian record is considered unique based on Last 4 digits of Social Security Number (SSN), Date of Birth, Last Name and First Name. An additional suffix may be added to the last 4 digits of the SSN to make a record unique when there are duplicates otherwise.
3. Each time an application is made, the user must first search the database for possible parent/guardian matches. If no matches are found, the user may add a new record.
4. Each unique parent/guardian record is linked to all safety seat applications made by that parent regardless of the distribution site.
5. The are no parent/guardian records or related safety seat applications prior to July 1, 2018.
6. If a parent/guardian has made an application at one distribution site during a reporting month, no other distribution site may open an application for that parent/guardian in the same month.

IMPORTANT: LISSDEP is set up to provide the distribution sites with information about parent/guardians (and related parent/guardians) who have made previous safety seat applications. The system will <u>not prevent</u> a user from creating a new parent/guardian record even if there is a possible existing match in the database. Each site is responsible for carefully searching and reviewing the information the system provides before creating a new parent/guardian record. For every new parent/guardian record created, the user should always “related parent/guardian” record, at a with spousal information. There are issues with parents going to multiple sites attempting to obtain safety seats for the same child.

Find/Create Parent Guardian Record

All safety seat application activity starts with a required search of the Parent/Guardian database to determine if a [likely] parent/guardian (or related parent/guardian) record already exists and if there

Is related safety seat activity. After logon, click the Seat application tab at the top of the page and the following page will appear:



1. **ID No**: - to find a record by unique ID number. Enter the number and click Find. This is find and display only one record that matches the value entered.

Or Enter

2. **Last 4 SSN** – must be four digits only
3. **Suffix** – must be digits only
4. **Birth Date** – select or enter valid date as mm/dd/yyyy
5. **First Name** – First Name (may enter one or more letters)[a]
6. **Middle** – optional [a]
7. **Last Name –** Last Name (may enter one or more letters) [a]
8. **Click Find**

[a] Please note the system will standardize the case of each letter of the name so each part always begins with an upper case letter followed by lower case letters – no matter how you enter the name. If a space is included in any part of a name, the first letter after the space will be shifted to upper case.

Suggested Search:

1. Enter Last 4 SSN and Birthdate (only).
2. Click **Find.**
3. Review any information displayed to determine if record matches the parent/guardian needed

   a. Click **View/Edit** icon to view Parent/Guardian information and Review Related Parent/Guardian record
   b. If Parent/Guardian record has seat applications, click on **Application** icon and review application record(s)
4. If this is a parent/guardian record that you want to use for the application:
   a. Click the **View/Edit** icon (will take you to Parent/Guardian Information page):
      i. Update any existing parent/guardian information.
      ii. Update any Related Parent/Guardian information (don't ignore!!)
      iii. Click **Seat Application Dashboard**
         1. Add new seat application.
5. If this is NOT a parent/guardian that matches the parent/guardian needed
   a. Enter the First Name, Middle and Last names.
   b. Enter a Last4SSN suffix (if needed) to make record unique.
   c. Click Create New Parent/Guardian Record button (will validate this is a new entry and take you to the Parent/Guardian Information page).
      i. Enter a new parent/guardian record and click **Save**.
      ii. Enter one (or more) Related Parent/Guardian records (don't ignore!)
      iii. **Seat Application Dashboard**
         1. Add new seat application.

>> You may perform other searches such as by Last4 SSN or Birthdate or Last name only (full or partial name search).

>> The search information is retained even if you navigate to another web page. If you return to the Find Parent/Guardian page simply press the Find key and the former search will be performed again. Make sure you the Clear button if you want perform a new search.

>> Also, if another distribution site has an active seat application for the same parent/guardian, you will receive a message that the record is locked and not available for your use or editing (but you may still view). If you are trying to initiate a seat application and another site has it locked, you should do some additional investigation as to why the same parent is making applications to 2 different sites.

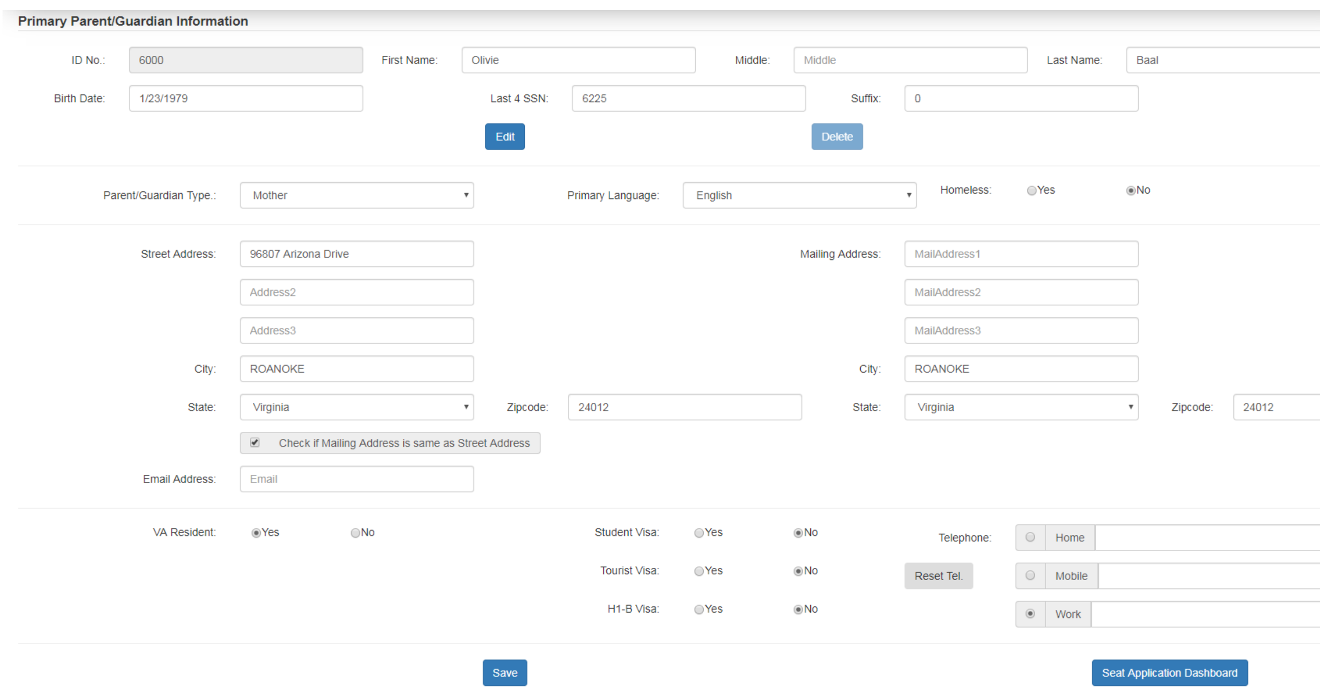
Create and Update Primary Parent/Guardian Information

The Primary Parent/Guardian Information page displays when the **View/Edit** button or C**reate New Parent/Guardian Record** button is clicked on the ***Find Primary Parent/Guardian Record page***. The page will allow updates an existing to an existing parent/guardian record or the addition of a new parent/guardian record when the **Save** button is clicked. For existing parent/guardian records, the user may change identifying parent guardian information or completely delete a parent/guardian record (when there are no related seat applications.

A Related Parent/Guardian record can be added, edited or deleted. Related Parent/Guardian information should be maintained if possible.

Click Seat Application Dashboard to view/edit safety seats issued to this parent/guardian or to create a new safety seat application for a child.

<u>Please note that if there is an active seat application entered/issued during a distribution site's current reporting month) for a parent/guardian, only users from the related distribution site can edit parent/guardian information on this page.</u>

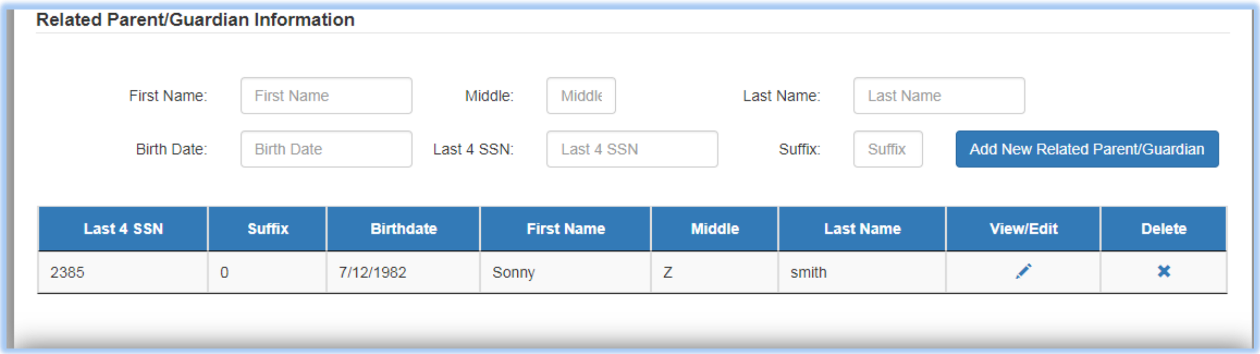


1. The identifying parent/guardian information provided from the from the Find Primary Parent Guardian page is displayed at the top of the page. The ID number is blank for a new records until the Save button is clicked.
2. For an <u>existing</u> parent/guardian record, click **Edit** to change parent/guardian name, birthdate, last4ssn or suffix.
3. To completely remove a parent guardian record, press the **Delete** button.
    a. The Delete button is active only if there are no seat applications for this parent/guardian. A parent/guardian record cannot be deleted when there is any related seat application.
    b. If you respond Yes (to delete), any <u>related</u> parent-guardian record will also be deleted.
4. Select the parent/guardian type, Primary Language and Homeless status.

5. Enter/change the Street address. If mailing address is the same, check the box. If mailing address is different, leave box unchecked and enter mailing address.
6. Check VA Resident and Visa information (yes or no required).
7. Enter telephone number(s) and check type (not required).
8. Click Reset Tel. to clear all values from phone fields.
9. Click Save to keep (or update record.
10. Add Related Parent/Guardian Information (Step 3 below).
11. Navigate to Seat Application Dashboard (Step 4 below).

Create and Update Related Parent/Guardian Information

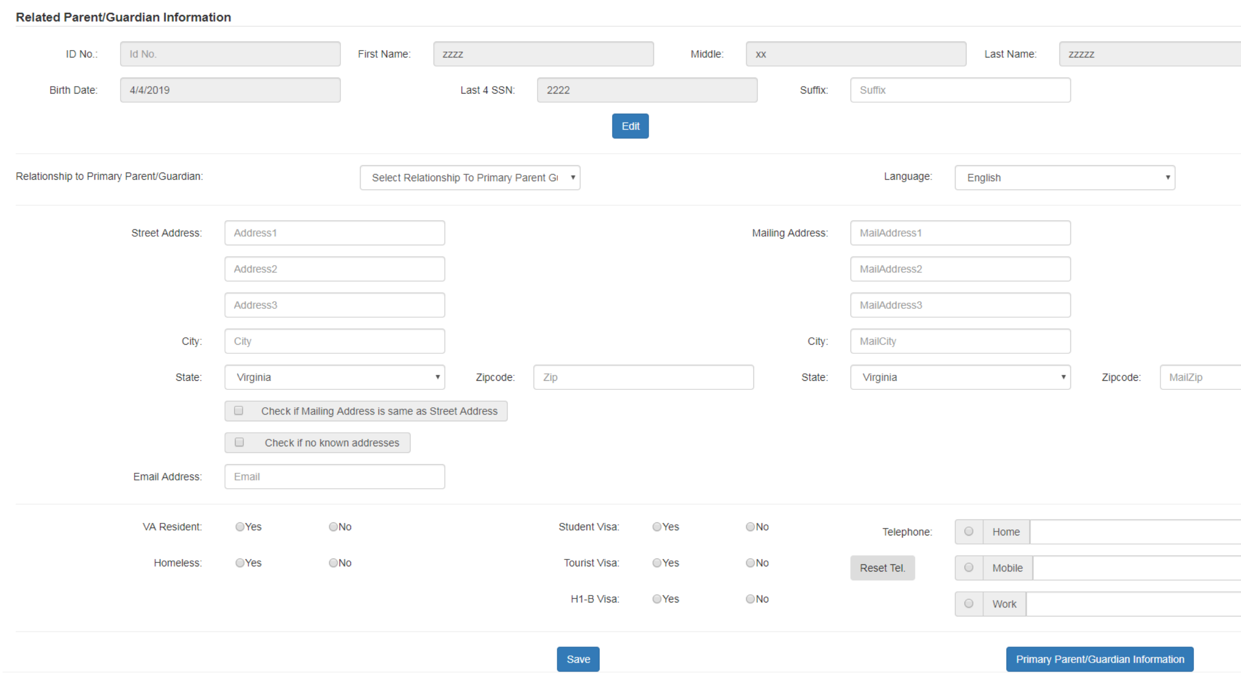
The Related Parent/Guardian Information is entered (or displayed) at the bottom of the **Primary Parent/Guardian Information** page.



- To view or edit any existing parent record click the View/Edit icon.
- To add a new related parent/guardian, provide search information (Last4SSN or Birth Date or both is recommended) and click the ***Add New Related Parent/Guardian*** button.
- To delete a related parent/guardian record, click the delete icon.

Note: you may not be able to add, edit or delete if there is an active application for another site being processed.

If ***View/Edit*** button clicked, the **Related Parent/Guardian** web page displays the detail information for the related parent/guardian which can be viewed or edited.



To change identifying information (name, birthdate, Last4SSN and suffix) for the related parent/guardian, click the Edit button.

To change other data, tab to (or click) the field(s) to be changed, change data, and click **Save**. (The **Save** button is only active if the record can be edited.)

Click **Primary Parent/Guardian Information** button to return to that page.

If ***Add New Related Parent/Guardian*** button is clicked, the **Related Parent/Guardian** web page displays On this page, you may select any existing parent/guardian records (that meet the search criteria entered on the Parent/Guardian Information page) to add as a related parent/guardian you may create a new related parent/guardian record.

The following existing parent/guardian records match or may match the information you entered for a new related parent guardian. You may use one of these existing records if it a valid relationship. ***Distribution sites should always carefully review data before using parent/guardian records with multiple relationships.***

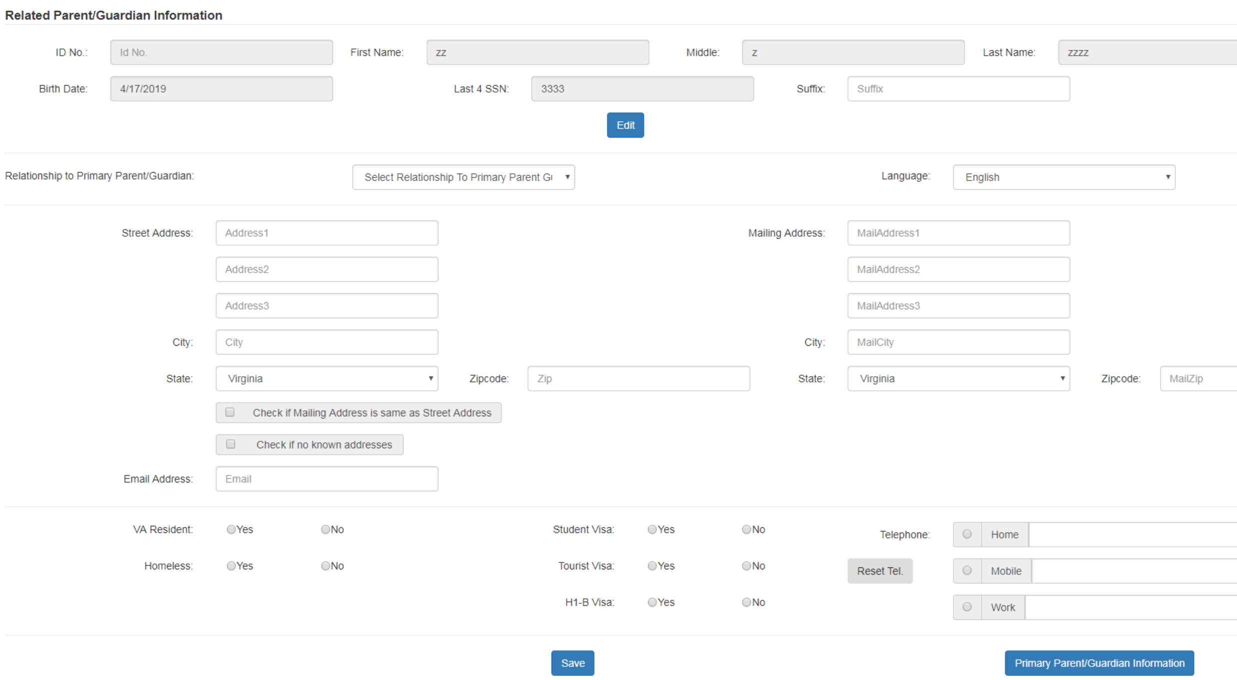
ID	Last 4 SSN	Suffix	Birthdate	First Name	Middle	Last Name	Type	Seat Appls?	Use This Record
1019	9999	0	01/18/1986	Malinda	S	Sanchez	Pri	No	Use this Record
1020	9999	0	04/25/1998	Dawn		Young	Pri	No	Use this Record
1021	9999	0	12/15/1987	Jane		Jones	Pri	No	Use this Record
1022	9999	0	03/15/2018	Maggie		Farmer	Pri	No	Use this Record

Showing 1 to 4 of 4 entries

Previous 1 Next

Add New

- Determine if any of the displayed records are the related parent guardian you want to use. Caution: if a records already exist for a related parent or guardian, you should do additional checking before using – this is a flag for possible fraudulent activity.
    - If ok, click **Use this Record** and the detail information will display below
    - If, after clicking **Use this Record** and viewing the data, you decide this is not the record you want to use, simply click **Use this Record** for another record or click **Add New.** (<u>This technique is a way of reviewing possible matches</u>.)
    - If none of the records displayed is the related parent/guardian, click **Add New**.

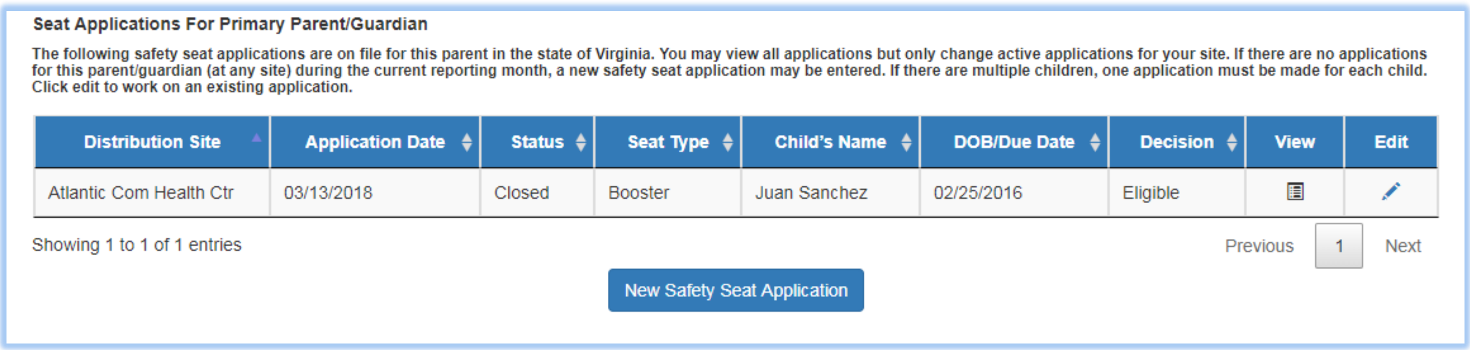


- If **Use this Record** Clicked,
  - Click **Edit** to change name, birthdate Last4SSN or suffix.
  - Change any of the other data displayed
  - Click **Save**.
- If Add New clicked:
  - Select VA Resident (Required)
  - Select Visa information (Required)
  - Select Language (Default is English)
  - Select Relationship to Primary Parent/Guardian (Required)
  - Enter Street Address
  - If Mailing Address is same as Street Address check box
    - If box not checked, enter Mailing Address
  - Enter email address (Optional)
  - Enter Telephone and type (optional)
  - Click Reset Tel. to clear all values from phone fields.
  - Click **Save**.
- Click Primary Parent/Guardian Information to return to that page.
  - When Parent/Guardian Information page displays, the new related parent/guardian record will display.

Create and Update Safety Seat Applications

Seat Application Dashboard

- The **Seat Application Dashboard** displays when the ***Applications*** button is clicked on **the Find Primary Parent Guardian** page or ***Seat Application*** button on the **Primary Parent/Guardian Information** page
- The **Application Dashboard** shows all seat applications (summary) for the primary parent/guardian selected. If a parent/guardian has no applications, a new application can be created.
- The Seat Application Dashboard permits access to the Seat Application page where existing applications may be viewed/edited or new applications created.
- Seat Applications (and Application Review records) may only be edited by the distribution site that entered the applications.


Seat Applications For Primary Parent/Guardian

The following safety seat applications are on file for this parent in the state of Virginia. You may view all applications but only change active applications for your site. If there are no applications for this parent/guardian (at any site) during the current reporting month, a new safety seat application may be entered. If there are multiple children, one application must be made for each child. Click edit to work on an existing application.

Distribution Site	Application Date	Status	Seat Type	Child's Name	DOB/Due Date	Decision	View	Edit
Atlantic Com Health Ctr	03/13/2018	Closed	Booster	Juan Sanchez	02/25/2016	Eligible		

Showing 1 to 1 of 1 entries

Previous 1 Next

New Safety Seat Application

If there are safety seat applications listed :

1. If the LISSDEP user is not from the distribution site who created the application
   a. The ***View*** button is active
   b. The application and application review data may be viewed only
2. If the user is from the distribution site that created the seat application **AND** the seat application date is during the distribution site's current reporting month **OR t**he status of the application is pending
   a. The ***Edit*** button is active.
   b. The user may edit the application and application review information.
3. If the user is from the distribution site that created the seat application and the seat application date is prior to the distribution site's current reporting month and the application status is closed
   a. The ***View*** button is active
   b. The application and application review data may be viewed only
      i. Except if the application was for an "Unborn Child"
         1. The distribution site may add a child name and date of birth if desired.

If there no seat applications listed

1. The ***New Safety Seat Application*** button is active
2. A new application and application review may be added for that parent/guardian

If there are safety seat applications listed but all are closed and from a prior month

1. The ***New Safety Seat Application*** button is active

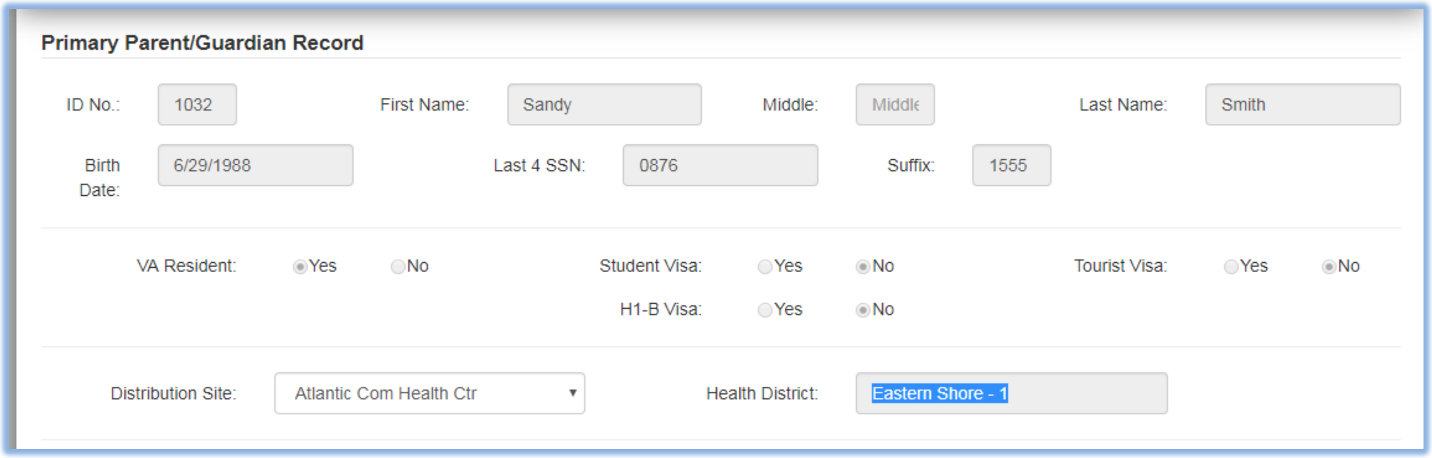
2. A new application and application review may be added for that parent/guardian

If there are safety seats listed and a site has created the an application for the parent guardian during their current reporting month

1. The ***New Safety Seat Application*** button is active
2. A additional application and application review may be added for that parent/guardian (i.e. multiple births or multiple eligible children).

Seat Applications

The seat application display parent/guardian information and distribution site when the page opens.

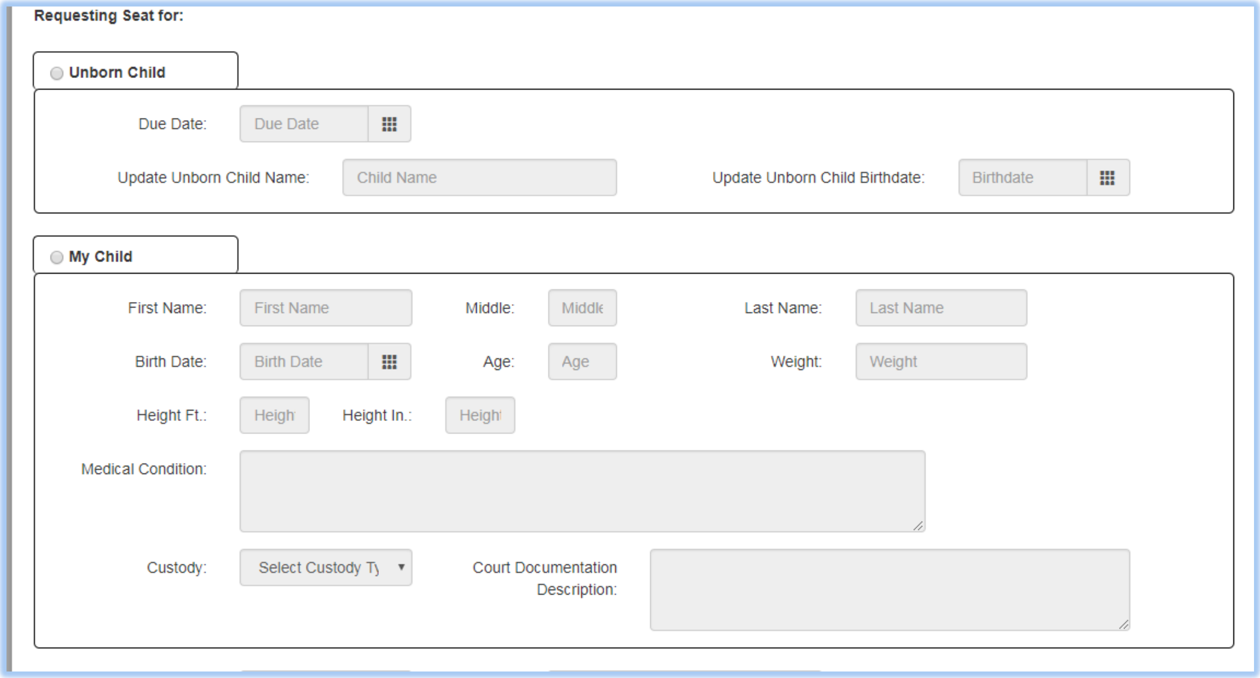


The Seat application information displays (for existing applications) or is available for entry (new application). Existing applications may be edited as described above. Otherwise, the data presented is "view only".

Seat Application General Information

1. **Application No. -** assigned by the system when an application is saved.
2. **Application Status** - Assigned by the system. It is *Pending* when until there a final action on the Application Review page – either a seat is issued (eligible application) or applicant is not eligible for a seat. Otherwise, the application status is *Closed*.
3. There are some actions the system automatically may take at the time the Seat Application page opens based on parent/guardian information:
    a. If parent/guardian is not a resident of Virginia or if any of the visa statuses are set to yes, the parent/guardian is not eligible for a safety seat
        i. The user must enter an application date and click ***Save***.
        ii. When the ***Save*** button is clicked, the application is closed and a Not Eligible record automatically created (reason is *Not VA resident* or *Visa related*).
4. **Application Date** – date parent made application (required)
5. **City County** – pick from dropdown (required)
6. **District Resident** – Yes/No (required)
    a. If no, the user is instructed to ***Save*** the Application.
    b. When the ***Save*** button is clicked, the application is closed and a Not Eligible record created is automatically created (reason is *Not a resident of the district site*).
7. **Application Type** -select *New* or *Reissue* (Required)
8. **Reissue Justification** – must be provided if Application Type is Reissue.

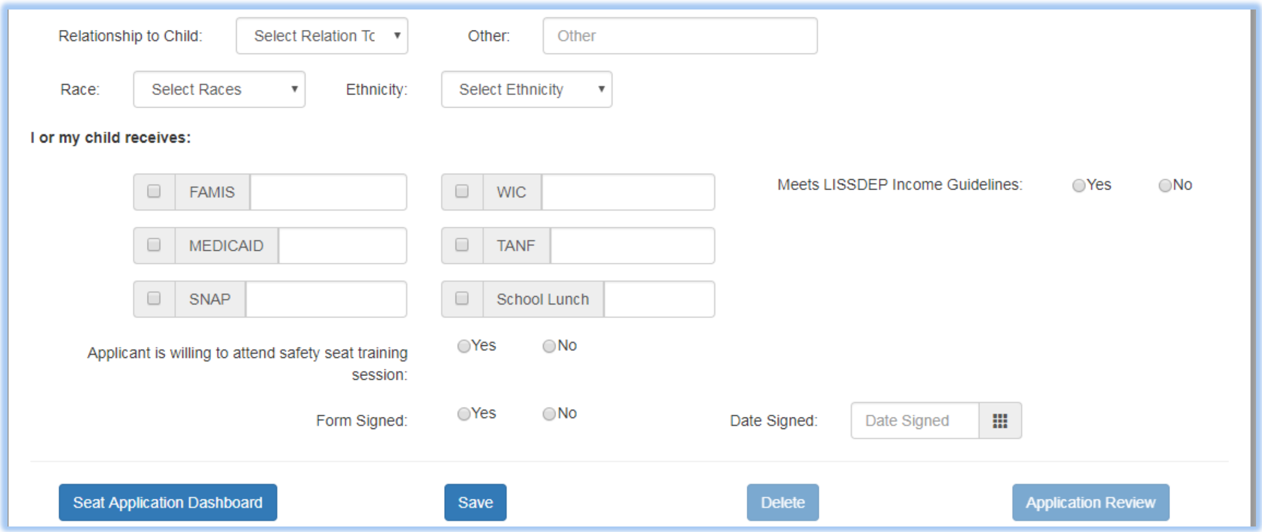
Requesting Seat For:



- User must indicate if seat is for Unborn Child or for My Child.
- If **Unborn Child**
  - **Due Date** – select date (required)
  - Site may enter **Unborn Child Name/Unborn Child Birthdate** after child is born.
- If **My Child** is Selected
  - **First Name, Middle, Last Name** – enter values (First Name, Last Name required).
  - **Birthdate** – enter[1] as mm/dd/yyyy or select[1] a date from the calendar (required)
  - **Age** – value is automatically calculated and displayed[1]
  - **Weight**– enter as whole number (optional)
  - **Height/Feet** – enter a whole number (optional)
  - **Height/inches** – enter as a whole number (optional)
  - **Medical Conditions** – enter text (optional)
  - **Custody** – select custody type from dropdown (optional)
  - **Court Documentation Description –** Enter text (optional)

[1] If using Internet Explorer as your browser, entering a birthdate instead of selecting it from the calendar may not automatically calculate the age and can produce an error ***Please Try Again*** when you attempt to ***Save*** the application. If this occurs, make sure you select the child's birthdate using the calendar.

Demographic, Benefits and Application Finalization Information



- **Relationship to Child** – Select from dropdown (required)
- **Race** - Select from dropdown (required)
- **Ethnicity** – Select from dropdown (required)
- **I or My child receives:** check all that apply, must enter eligibility number if benefit checked
- **Meets LISSDEP Income Guidelines** – Yes/No (required only if child receives <u>none</u> of the benefits like FAMIS, MEDICAID, WIC, etc.)
    - If no, the user is instructed to ***Save*** the Application.
    - When the ***Save*** button is clicked, the application is closed and a Not Eligible record created is (reason Income is too high)
- **Applicant is willing to attend safety seat training session** – Yes/No (required)
- **Form Signed** – Yes/No (required)
- **Date Signed** – select/ enter date as mm/dd/yyyyy (required)

If ***Save*** button is <u>active and clicked</u>:

- If new application, it is saved into database
    - Additional data is automatically saved as noted above
- If existing application
    - Database application information is updated in database

If ***Delete*** button is <u>active and clicked</u>:

- A notice is displayed indicating Application/Application Review data will be deleted if you continue and the type of data involved.
- If you indicate it is Ok to delete:
    - Related Application Review is deleted
    - Application is deleted

If **Seat Application Dashboard** button is clicked

- You are returned to the **Seat Application Dashboard**

If the **Application Review** button is clicked

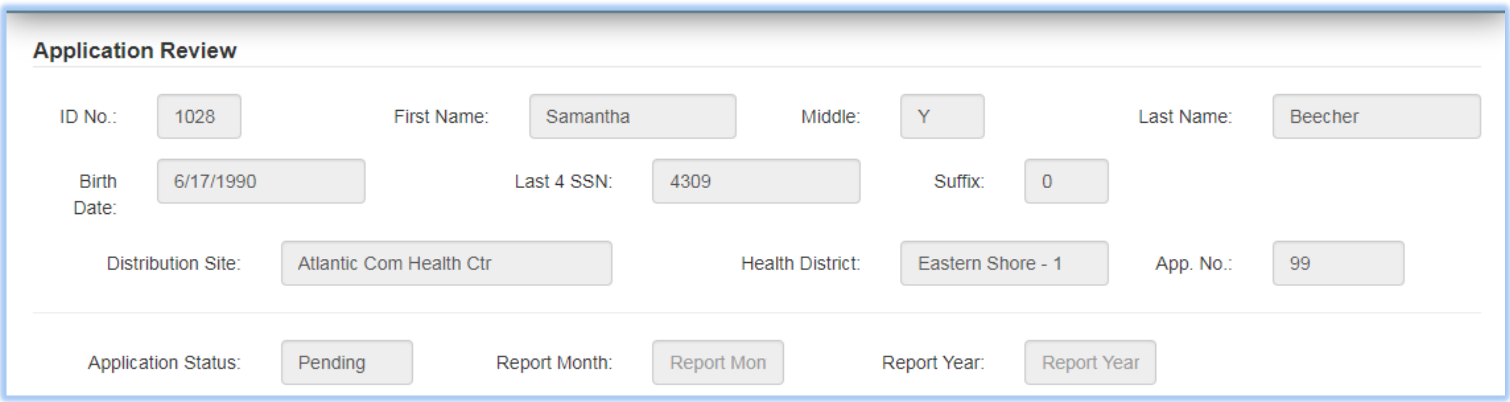
- You are taken to the **Application Review** page

Application Review

The **Application Review** page is used to record the outcome of the application review: the applicant is either eligible or not eligible for a safety seat.

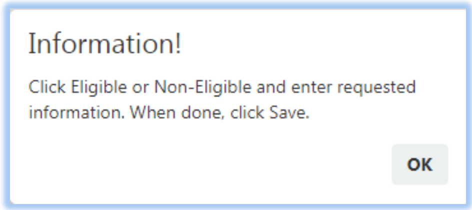
- The **Application Review** page displays when the ***Application Review*** button is clicked on the **Seat Application** page.
- The ***Save*** and ***Delete*** buttons are activated for users (distribution sites) who are able to add, edit and delete Application Review data.
- Buttons on the **Application Review** page are active ONLY when monthly tracking form is in Draft status.

The top section of the **Application Review** page provides identifying information regarding the parent/guardian and the safety seat application; nothing may be changed.



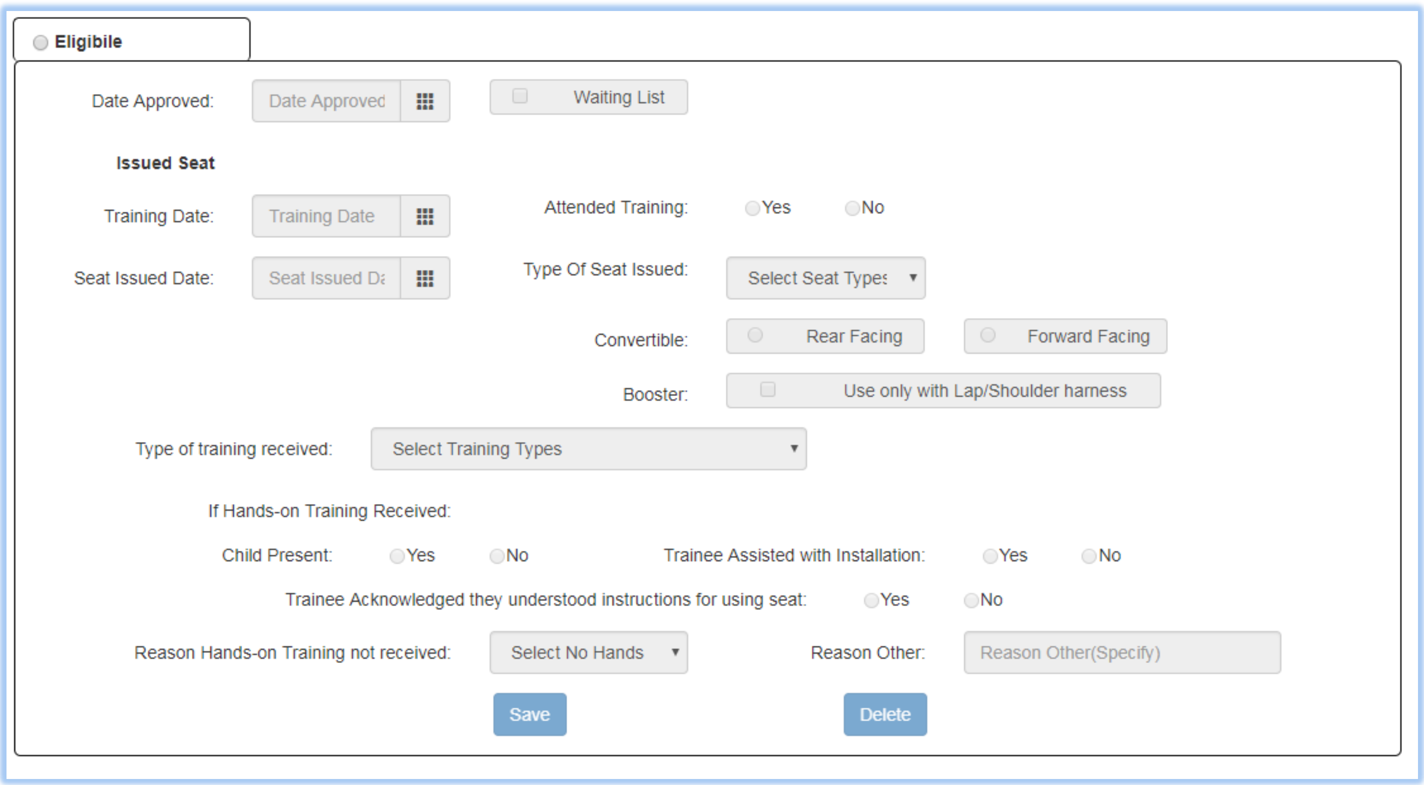
1. **ID No., First Name, Middle, Last Name, Birthdate, Last4 SSN** and **Suffix** are from ***Parent Guardian*** record.
2. **Distribution Site** and **Health District** indicate which site/district initiated the seat application.
3. **App. No**. (Application Number) is assigned by the system as a unique identifier for the application.
4. **Application Status** is pending or closed, depending on the action reported in **the Application Review** page. It is pending until 1) a safety seat is issued or 2) an ineligible status is recorded at which time is automatically becomes closed.
5. Report Month and Report Year indicate is the current draft tracking report on Application Review data will be reported. These values are blank until an eligible/not eligible entry below is saved.

When the **Application Review** page opens, you will see this message if no **Application Review** has been entered. Otherwise, the **Application Review** information will display.



Eligible Applications

- For <u>new</u> Application Review reporting: if the If the applicant is eligible for a safety seat, the *Eligible* section of the **Application Review** page is selected (clicked).
- For <u>existing</u> **Application Review** decisions, if applicant was determined to be eligible, the Eligible Information displays.

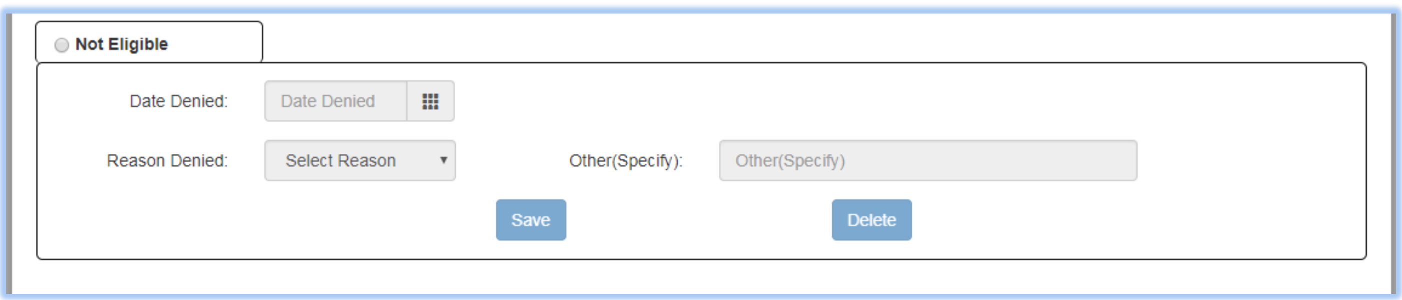


1. Click **Eligible** to select Eligible section of the page (<u>new</u> record only).
2. **Date Approved –** Date Application Approved (required);
3. **Waiting List -** Check if applicant put on waiting list; uncheck to remove (optional)
   a. Distribution Site must be set to use waiting list for this to be selected.
   b. If put on waiting list, ***Save*** record at this point and do not add more data.
4. **Training Date –** Date applicant scheduled for training (required)
   a. Can ***Save*** record at this point without adding more information
5. **Attended Training** – Yes/No (required)
6. **Seat Issue Date –** Select/enter date parent/guardian was issued seat (required)
   a. Must be date during current reporting month
7. **Type of Seat Issued –** Select Convertible or Booster (required)
8. **Convertible –**select rear/front facing (required if seat type issued is convertible)
9. **Booster –** check if booster issued and true (optional)

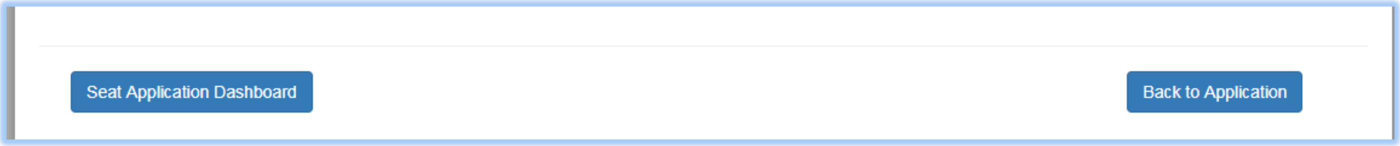
10. **Type of Training Received –** select from dropdown (required)
11. **Hands On Training Information –** Check all that apply (active only if hands on training received)
12. **Reason Hands on Training not received –** select reason from dropdown (required if hands on training not received).
13. ***Save*** – When clicked, will create a new eligibility information record or update existing record.
    a. Will also add/update seat inventory transaction if seat issued.
    b. Display at top of page will change:
        i. Seat application status = closed
        ii. Report Month/Year = month/year of tracking report in draft status.
14. ***Delete*** – When clicked, will delete (remove) all eligible data (keeps application).
    a. Will also delete seat inventory transaction if seat issued.
    b. Display at top of page will change:
        i. Seat application status = pending
        ii. Report Month/Year = blanks

Not Eligible Applications

- For <u>new</u> Application Review reporting: if the If the applicant is <u>not eligible</u> for a safety seat, the *Not Eligible* section of the **Application Review** page is selected (clicked).
- For <u>existing</u> **Application Review** decisions, if applicant was determined to be not eligible, the *Not Eligible* Information displays.



1. Click **Not Eligible** to activate the Not Eligible section of the page (<u>new</u> record only)
2. Date Denied – select/enter date application denied (required)
3. Reason Denied – select reason denied from dropdown (required)
4. ***Save*** - When clicked, will create a new not eligible record or update existing record.
    a. Display at top of page will change:
        i. Seat application status = closed
        ii. Report Month/Year = month/year of tracking report in draft status.
5. ***Delete*** - When clicked, will delete (remove) all not eligible data (keeps application).
    a. Display at top of page will change:
        i. Seat application status = pending
        ii. Report Month/Year = blank



- Return to Seat **Application Dashboard** page by clicking designed button.
- Return to **Seat Application** page by clicking designated button.

Enter Monthly Inventory Transactions

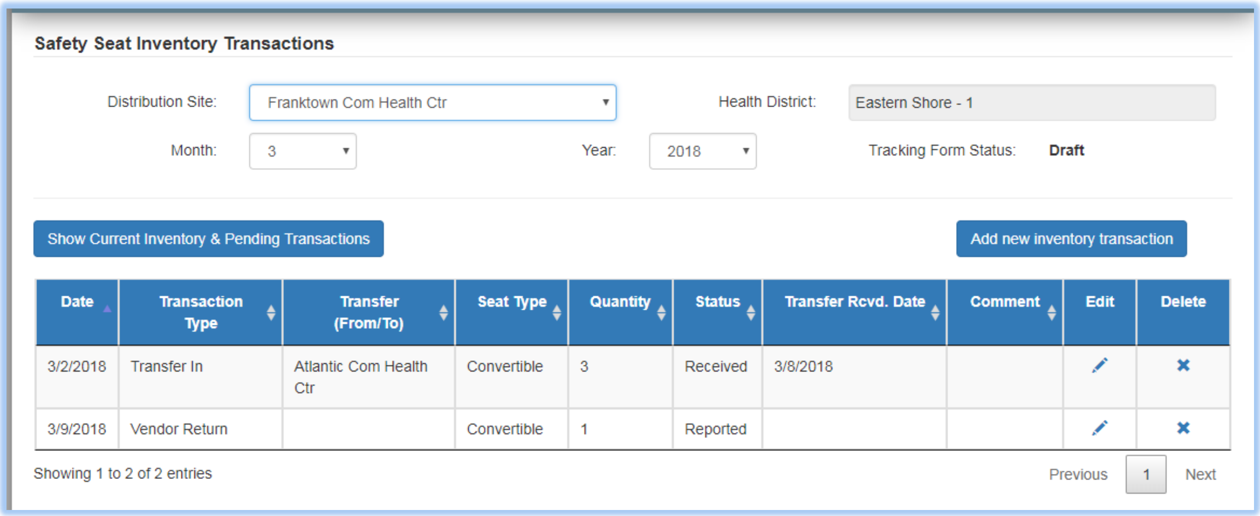
In order to maintain an accurate monthly safety seat inventory, all transactions that increase or decrease inventory must be captured. Safety seats issued to parents/guardians are reported as a part of the seat application process. Other inventory transactions are reported to LISSDEP using the Seat Inventory web page. The following inventory transaction types are reported and their impact on inventory noted:

Transaction Type	Inventory Impact	How Entered into LISSDEP
Shipments from Vendor	+	Seat Inventory page
Returns to Vendor	-	Seat Inventory page
Transfers to another distribution site	-	Seat Inventory page
Transfers from another distribution site	+	Seat Inventory page
Lost or Stolen	-	Seat Inventory page
Used as demonstrators	-	Seat Inventory page
Damaged or "expired"	-	Seat Inventory page
Distributed (issued) to parents/guardians	-	Application Review Page
Inventory adjustments	+/-	Seat Inventory page[1]

[1] Can only be performed by VDH LISSDEP Administrator

Safety Seat Inventory Transactions

- All safety seat inventory transactions (except seat distributed and inventory adjustments) may be entered on the Safety Seat Inventory Transactions page.
- Click the Seat Inventory tab at the top of the LISSDEP page to display the page.
- The Inventory transactions are organized by reporting month. Users may add/update/delete transactions for current reporting month (tracking from in Draft status(; Historical transactions (starting 7/1/2018) may be viewed only.
- Inventory transfers require actions by both the sending and receiving site before they are considered “complete”.
- Seats distributed to parents/guardians during the month do <u>not</u> display on this page.


Safety Seat Inventory Transactions

Distribution Site: Franktown Com Health Ctr | Health District: Eastern Shore - 1

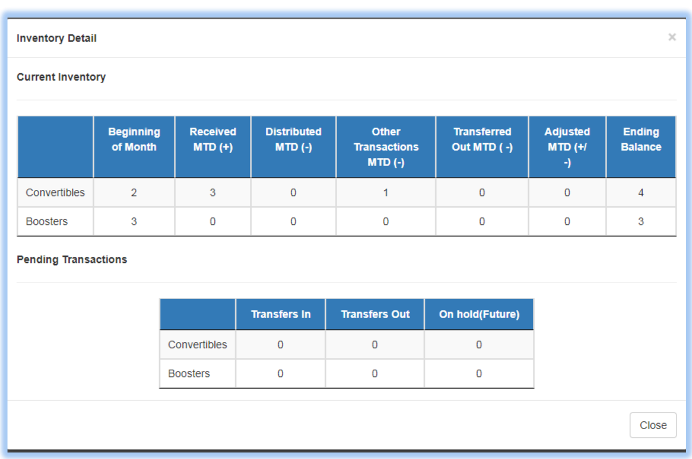
Month: 3 | Year: 2018 | Tracking Form Status: Draft

Show Current Inventory & Pending Transactions | Add new inventory transaction

Date	Transaction Type	Transfer (From/To)	Seat Type	Quantity	Status	Transfer Rcvd. Date	Comment	Edit	Delete
3/2/2018	Transfer In	Atlantic Com Health Ctr	Convertible	3	Received	3/8/2018			
3/9/2018	Vendor Return		Convertible	1	Reported				

Showing 1 to 2 of 2 entries | Previous 1 Next

1. When the web page displays, the inventory transactions for the current month will display.
2. Users may edit or delete any current transaction or add new transactions
3. Users may view prior month inventory transactions (back to 7/2018) by clicking the dropdown arrow by Month and Year and selecting the month desired.
4. Users may view current distribution site inventory summary by clicking the ***Show Current Inventory and Pending Transactions*** button. (Pending transactions will be defined below).


Inventory Detail

Current Inventory

	Beginning of Month	Received MTD (+)	Distributed MTD (-)	Other Transactions MTD (-)	Transferred Out MTD (-)	Adjusted MTD (+/ -)	Ending Balance
Convertibles	2	3	0	1	0	0	4
Boosters	3	0	0	0	0	0	3

Pending Transactions

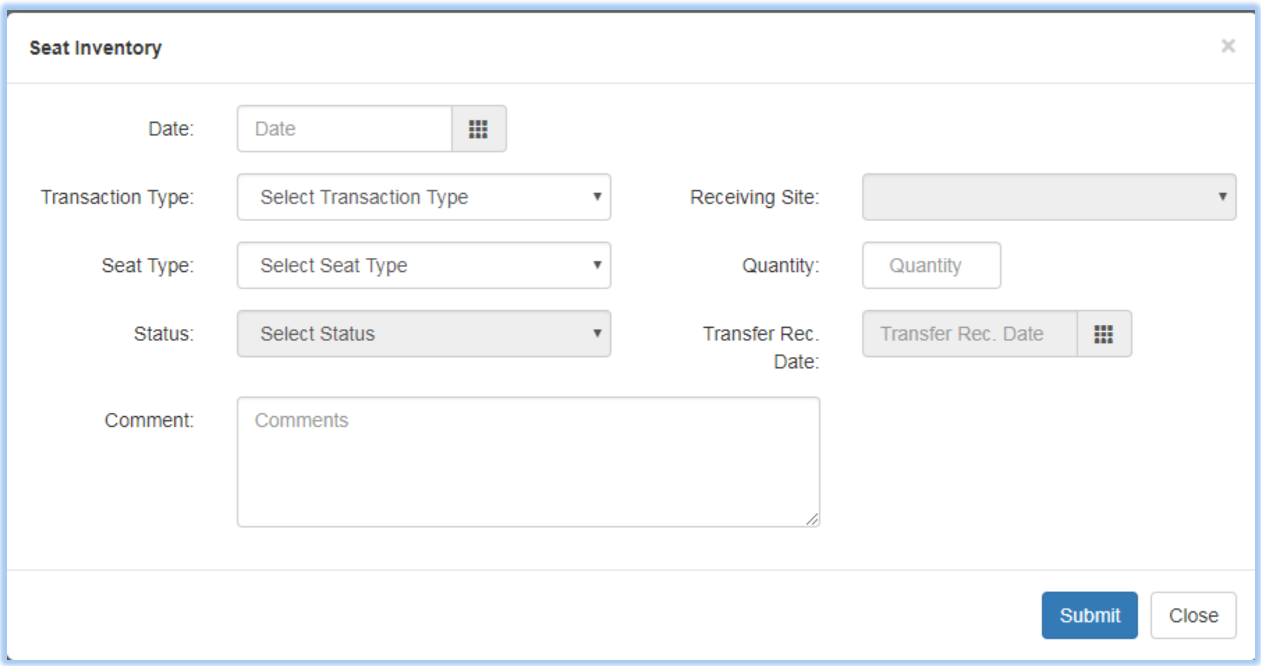
	Transfers In	Transfers Out	On hold(Future)
Convertibles	0	0	0
Boosters	0	0	0

Close

5. Add Transaction - Click ***Add New Inventory Transaction*** button.
6. Edit Transaction – Click ***Edit*** icon beside transaction.
7. Delete Transaction – Click ***Delete*** icon beside transaction.
8. See below for add and edit transaction information.

Add/Edit Inventory Transaction

When the ***Add New Inventory Transaction*** button or the ***Edit*** (transaction) button is clicked, the ***Seat Inventory*** transaction windows opens and allow entering or editing of a transaction. When entry/editing is complete the Submit button is clicked to save the information.



Add/Edit Inventory Transactions (Typical Transactions)

1. **Date** – select transaction date from calendar should be in current reporting month.
2. **Transaction Type** – select from dropdown list (required
3. **Receiving Site** – see Inventory Transfer section below (required if transfer out)
4. **Seat Type** – select from dropdown list (required)
5. **Quantity** – enter value or click arrows specify count (required)
6. **Status** – automatically set depending on type of transaction
7. **Transfer Rec. Date** – See **Inventory Transfer** instructions below.
8. **Comment** – enter any text to provide additional information on transaction (optional)
9. **Submit** – Save information entered or update.
10. **Close** – close window (without saving)

Inventory Transfers (from one site to another)

1. Inventory transfers are initiated by a <u>sending distribution site user</u>.
2. The sending distribution site enters a transfer transaction:
   a. **Transaction Date** – Select date of transfer from calendar or enter as mm/dd/yyyy (required)
   b. **Transaction Type** – select <u>Transfer Out</u> (required)

   c. **Receiving Site** – select distribution from dropdown list (required)
   d. **Seat Type** – select Convertible/Booster from dropdown list (required)
   e. **Quantity** – select/enter quantity (required)
   f. **Comment** – enter any comment related to the transaction (optional)
   g. Click ***Submit*** (or Cancel to cancel action).
3. When the sending distribution site user clicks ***Submit*** (Step 2.g above):
   a. A transaction for the receiving site is automatically created and will be visible to the receiving site user at the next logon into LISSDEP (and going the Safety Seat Inventory Transaction page).
4. The receiving site will logon to LISSDEP.
   a. A message will display to the receiving site user that there is a pending transfer transaction they must update.
   b. To Update, the user clicks the ***Edit*** icon button beside the Transfer In transaction.
      i. The transfer transaction will display.
      ii. The user will provide the Transfer Receipt Date for the transfer.
      iii. The user will click ***Submit***.
5. When the receiving site user clicks ***Submit*** (Step 4.b.iii above):
   a. The transfer transaction will be updated for the receiving site:
      i. The Transfer Receipt Date will be added.
      ii. The quantity transferred will be added to the receiving site's inventory.
      iii. The transaction status will be changed to received.
   b. The transfer transaction will be updated for the sending site:
      i. The Transfer Receipt Date will be added.
      ii. The quantity transferred will be deducted from the sending site's inventory.
      iii. The transaction status will be changed to received.
6. The inventory status of a transfer is *Pending* until the receiving site completes the inventory transaction (by entering the receipt date).
   a. A transfer may still be pending at the end of the reporting month. This may impact end of month physical inventory balances. Sites should add a comment to the "inventory certification" noting the quantity of seats in pending status.

Backdating and Entering "future" Transactions

Because the calendar month and the reporting month do not always align (working on April's report at the beginning of May, for example) or you may have overlooked adding a transaction at the end of the previous month or you may want to post a transaction for the next reporting month. LISSDEP permits you to do the following:

1. You may enter an inventory transaction date that is up to five days less than the beginning of the reporting month. It will post to the current reporting month but have a date in the prior month.
2. You may enter a transaction date that is greater than the last day of the reporting month (but not greater than the current date). These transactions will be accepted by the LISSDEP but not applied to the tracking report month. It status will be "on hold". When you create a new tracking report (for the month in which the transaction occurred) the status will be changed from "on hold" and applied to the inventory. An example of when this is used: you are working on April's monthly report on May 5th and you receive a vendor shipment on May 5th. You could enter the shipment with a date of May 5th and is would not be applied to your inventory until you start working on May's report.

Monthly Tracking Forms

The LISSDEP monthly tracking form can be created immediately after the monthly report from the prior month has been "State Approved". This process is described earlier in this document. Once created, a distribution site can enter application information and seat inventory transactions (also described above). The data for the monthly tracking report are calculated based on the application and seat inventory data entered.

Tracking reports submitted for prior months are also available. Data reported for prior months may not be changed.

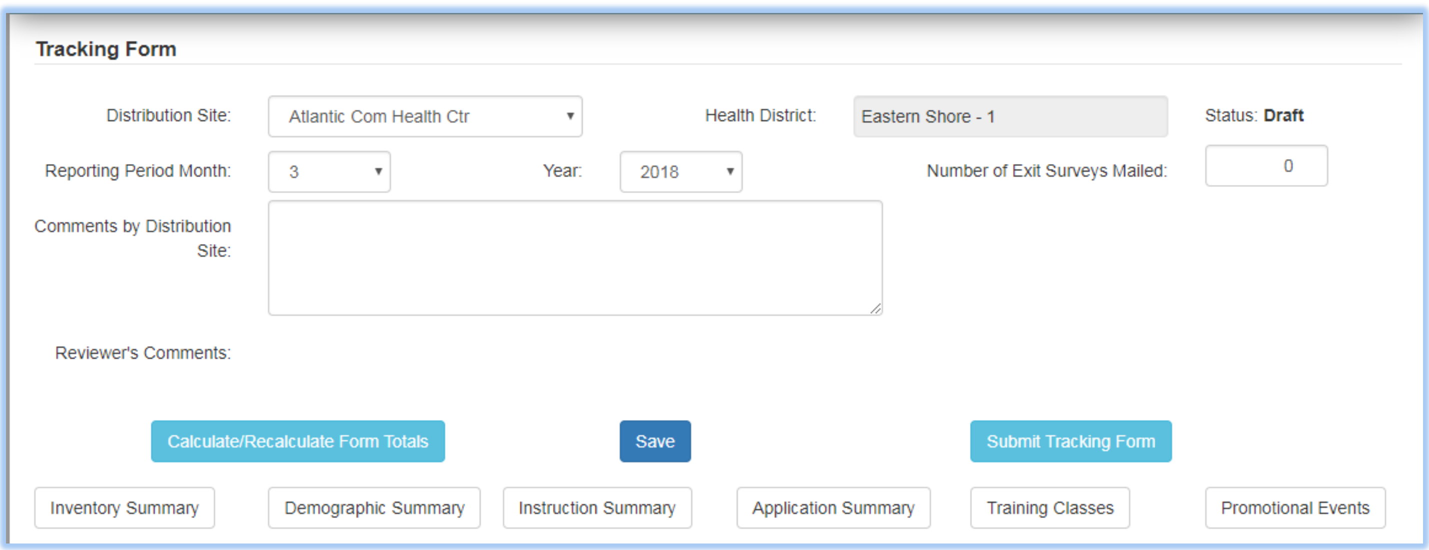
There are multiple sections to the monthly tracking report:

- **Tracking Form Heading**
- **Inventory Summary**
- **Demographic Summary**
- **Instruction Summary**
- **Application Summary**
- **Training Classes Conducted**
- **Promotional Events**

Tracking Form Heading

This section of the tracking report shows the distribution site, health district, tracking form status tracking form moth/year. By default, the tracking form for the current reporting period displays when you click the Tracking Form tab at the top of the page. Users may change the month/year to display prior reports (you may also use the **Dashboard** tab to select the tracking report. All data on prior tracking reports may be viewed only.

For reports with Draft status, the tracking report also allow the user to enter the number of surveys mailed, add comments to the monthly report, calculate/recalculate the monthly report totals (based on detail data entered) and submit the completed monthly report.



1. **Distribution Site** – dropdown to select (if user has access to multiple sites)
2. **Health District** – display only
3. **Reporting Period Month** – dropdown to select month
4. **Reporting Period Year** – dropdown to select year
5. **Number of Exit Surveys Mailed** – user may add if tracking form status is Draft (and ***Save***)
6. **Status** – status of tracking form displayed
7. **Comments by Distribution Site** – user may add any comment if status is Draft and (***Save***).
8. **Save** – Click to save Number of exit surveys mailed or Comments by distribution site.
9. **Reviewer's Comments** – Comments reviewer added after tracking form submitted.
10. **Calculate/Recalculate Form Totals** – Active if form is in Draft status. Click to calculate tracking form summary data.
11. **Submit Tracking Form** - Active if form is in Draft status. Click to submit monthly tracking form.
12. **Inventory Summary** – Click to see Inventory Summary information for month.
13. **Demographic Summary** – Click to see Demographic Summary information for month.
14. **Instruction Summary** – Click to see Instruction Summary information for month.
15. **Application Summary** – Click to see Application Summary information for month.
16. **Training Classes** – Click to view (or add if status is Draft) Training Class information for month
17. **Promotional Events** - Click to view (or add if status is Draft) Promotional Events information for month

Tracking Form – Inventory Summary

When the Inventory Summary (on the Tracking Form) is clicked, the summarized inventory data for the month is displayed.

SAFETY SEAT INVENTORY

	On hand at beginning of month	Received from any source during month	Distributed during month	Returned to vendor, stolen or missing	Used for demonstration	Given to another site	Total number of safety seats remaining at end of month
Convertibles	18	2	3	0	1	5	11
Boosters	6	0	1	0	0	0	5
COMBINED TOTAL (OF CONVERTIBLES AND BOOSTERS ISSUED)							4

Show Inventory Detail

Note: There is no detail inventory information for reports prior to 7/1/2018

Adjustments: Convertibles 0

Boosters 0

Inventory Certification (Required)

Yes No

We certify that the ending inventory above matches the actual number of safety seats of each type on hand at our distribution site at the end of the month. If there are pending seat transfers, please indicate in comment section below.

Ending Inventory Comment

Save

1. The inventory is displayed at the top of the page.
2. Show Inventory Detail – click button to display a report of all transactions for month.
3. Prior to submitting the monthly tracking form, the distribution site must certify their inventory at the end of the month.
   a. Click **Yes** to certify your physical inventory matches this report.
   b. Note a discrepancies (such as pending transfers, etc.) in the **Comments** box.
   c. Click ***Save***.

Show Inventory Detail (Sample)

Inventory Detail

Transaction Date	Transaction Type	Seat Type	Quantity	Comment	TransferRecvDate	Parent Last Name	Trans Status
03/02/2018	Transfer Out	Convertible	3	Receiving site received transfer.	03/08/2018		Received
03/02/2018	Vendor Return	Booster	1	Damaged in Shipment Order # 233444			Reported
03/06/2018	Issued	Convertible	1			Hersh	Issued
03/08/2018	Shipment	Convertible	2				Received
03/13/2018	Transfer Out	Convertible	2	Receiving site received transfer.	03/16/2018		Received

Tracking Form – Demographic Summary

This section of the tracking report shows the demographic information for the seats issued.

DEMOGRAPHIC INFORMATION

AGE

Pregnant Parents	<1	1	2	3	4	5	6	7	8 +	Total
2	0	0	2	0	0	0	0	0	0	4

RACE

African American	Caucasian	Asian	Native American	Biracial	Other	Not Specified	Total
2	1	0	0	0	0	1	4

ETHNICITY

Hispanic	Non-Hispanic	No Specified	Total
1	2	1	4

Show Demographic Detail Data

Note: There is no detail inventory information for reports prior to 7/1/2018

1. Demographics are reported by Age, Race and Ethnicity.
2. Click Show **Demographic Detail Data** to see the data that were summarized.

Show Demographic Detail Data (sample)

Demographic Detail

Parent Name	App. No.	Child Name	Child Birthdate	Child Age	Race	Ethnicity
Brown, Janie	85	[Unborn Child]	04/30/2018	Pregnant Parents	African American	Non-Hispanic
Hersh, Alice	74	Hersh, Amy	05/01/2015	2	Not Specified	No Specified
Sanchez, Malinda	86	Sanchez, Juan	02/25/2016	2	Caucasian	Hispanic
Snipe, Elenor	91	[Unborn Child]	05/01/2018	Pregnant Parents	African American	Non-Hispanic

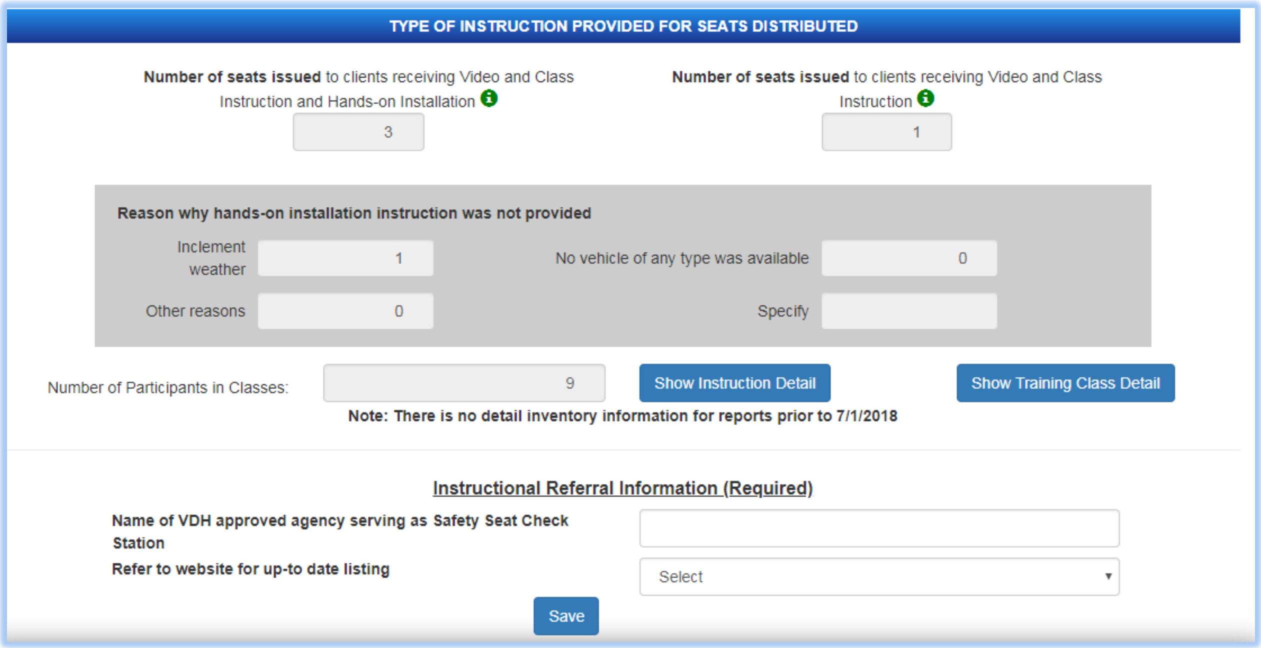
Showing 1 to 4 of 4 entries

Previous 1 Next

Close

Tracking Form – Instruction Summary

This section of the tracking form displays a summary of the training received for seats issued.



1. Training totals are presented by type; reasons no hands-on training displayed.
2. **Number of Participants** in Classes displayed; based on data reported on Training Classes page.
3. **Show Instruction detail** – click to see detail data for numbers,
4. **Show Training Class Detail** – click to go to Training Classes page.
5. <u>You must provide additional instruction information before you may “submit” a tracking form:</u>
    a. Name of VDH approved agency serving as a safety Seat Check Station
    b. Refer to Website for up-to-date listing
    c. ***Save –*** Click to save information entered.

Show Instruction Detail Data (sample)

Instruction Detail

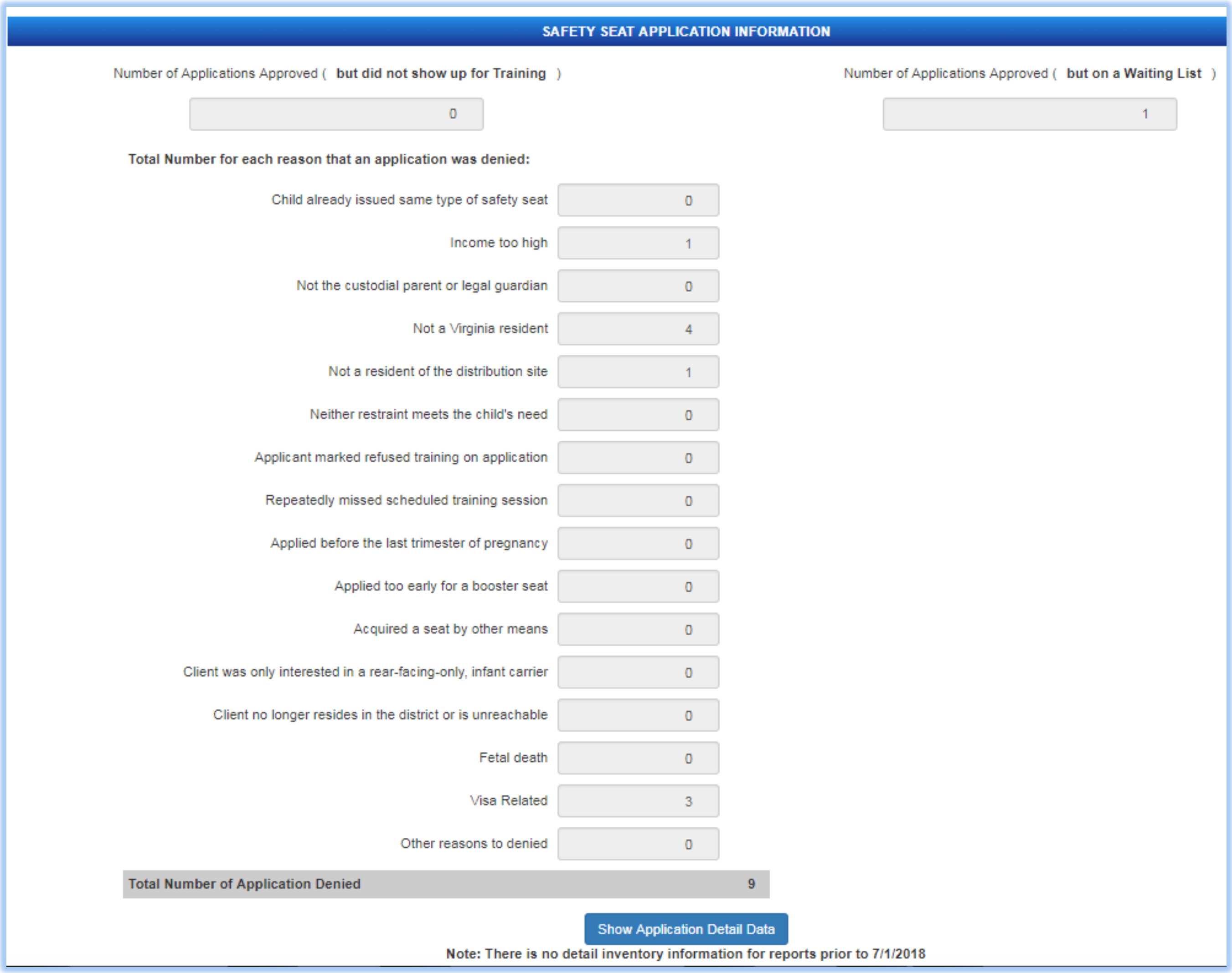
Parent Id	Parent Name	Appl.No.	Child Name	Type Of Training	Reason No Hands-On	VDH Approved Agency	Website Referal
1004	Hersh, Alice	74	Hersh, Amy	Video/Class/Hands-on	N/A		
1018	Brown, Janie	85	[Unborn Child]	Video/Class/Hands-on	N/A		
1019	Sanchez, Malinda	86	Sanchez, Juan	Video/Class/Referral	Inclement Weather		
1024	Snipe, Elenor	91	[Unborn Child]	Video/Class/Hands-on	N/A		

Showing 1 to 4 of 4 entries   Previous 1 Next

Close

Tracking Form – Application Summary

This section of the tracking form shows a summary of applications received.



SAFETY SEAT APPLICATION INFORMATION

Number of Applications Approved (but did not show up for Training)	Number of Applications Approved (but on a Waiting List)
0	1

Total Number for each reason that an application was denied:

Child already issued same type of safety seat	0
Income too high	1
Not the custodial parent or legal guardian	0
Not a Virginia resident	4
Not a resident of the distribution site	1
Neither restraint meets the child's need	0
Applicant marked refused training on application	0
Repeatedly missed scheduled training session	0
Applied before the last trimester of pregnancy	0
Applied too early for a booster seat	0
Acquired a seat by other means	0
Client was only interested in a rear-facing-only, infant carrier	0
Client no longer resides in the district or is unreachable	0
Fetal death	0
Visa Related	3
Other reasons to denied	0
Total Number of Application Denied	**9**

Show Application Detail Data

Note: There is no detail inventory information for reports prior to 7/1/2018

1. **Total number of applications approved but did not show up fro training**
2. **Number of Applications Approved but on a Waiting List**
3. **Total Number for each reason that an application was denied:**
4. **Total Number of Applications Denied**
5. **Show Application Detail Data**

Show Application Detail Data (sample)

Application Detail

Parent Name	Appl.ID.	Child Name	Decision	Decision Date	Training Date	Attended Training	Waiting List	Reason Not Religible
Carter, Kelly	93		Not Eligible	03/08/2018	N/A	N/A	N/A	Not a Virginia resident
Farmer, Maggie	89		Not Eligible	03/05/2018	N/A	N/A	N/A	Visa Related
Goff, Brenda	90		Not Eligible	03/09/2018	N/A	N/A	N/A	Not a resident of the distribution site
Johnson, Cynthia	103	[Unborn Child]	Eligible	03/22/2018	N/A	N/A	Yes	N/A
Johnson, Renea	92	[Unborn Child]	Not Eligible	03/15/2018	N/A	N/A	N/A	Income too high
Jones, Jane	98		Not Eligible	03/02/2018	N/A	N/A	N/A	Visa Related
Kartis, Cynthia	101		Not Eligible	03/15/2018	N/A	N/A	N/A	Visa Related
Plazma, Becky	95		Not Eligible	03/26/2018	N/A	N/A	N/A	Not a Virginia resident
Smith, Amy	102		Not Eligible	03/05/2018	N/A	N/A	N/A	Not a Virginia resident
Young, Dawn	87		Not Eligible	03/01/2018	N/A	N/A	N/A	Not a Virginia resident

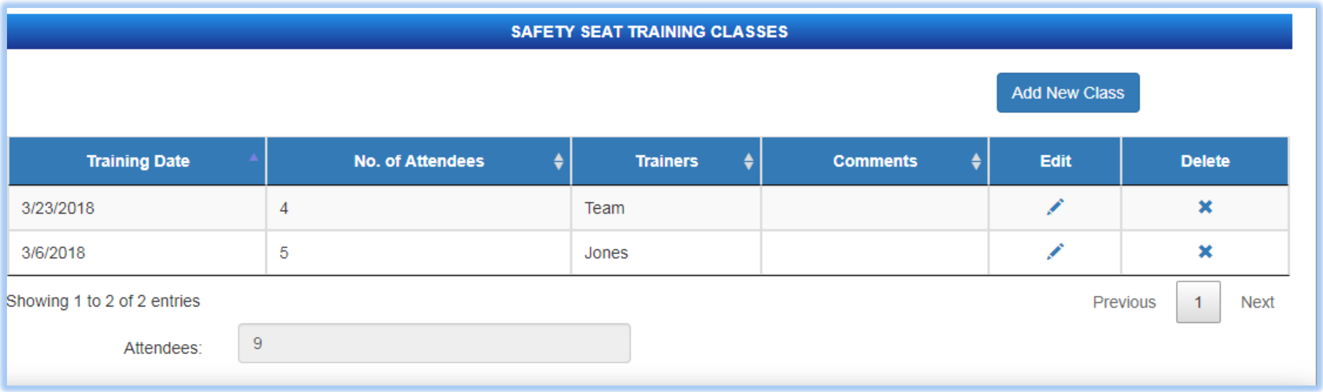
Showing 1 to 10 of 10 entries

Previous 1 Next

Close

Tracking Form – Training Classes

This section of the tracking form is used to enter training class data during the reporting month and to view training class data reported.


SAFETY SEAT TRAINING CLASSES

Add New Class

Training Date	No. of Attendees	Trainers	Comments	Edit	Delete
3/23/2018	4	Team			
3/6/2018	5	Jones			

Showing 1 to 2 of 2 entries

Previous 1 Next

Attendees: 9

1. Training class data are displayed.
2. For current reporting month, each row may be **edited, deleted** or you may **Add New Class**.
3. If **Edit** or **Add New Class** clicked, this screen opens:
   a. **Training Date** – select/enter date of class (required)
   b. **No. of Attendees** – enter number of people who attended the class (required)
   c. **Trainers** – Enter the trainer(s) name(s) (required)
   d. **Comments** – Enter any comment about the class (optional)
   e. **Submit** – Click to <u>save</u> data entered/updated (required if you want to save information)
   f. **Close** - Close screen

Tracking Form – Promotional Events

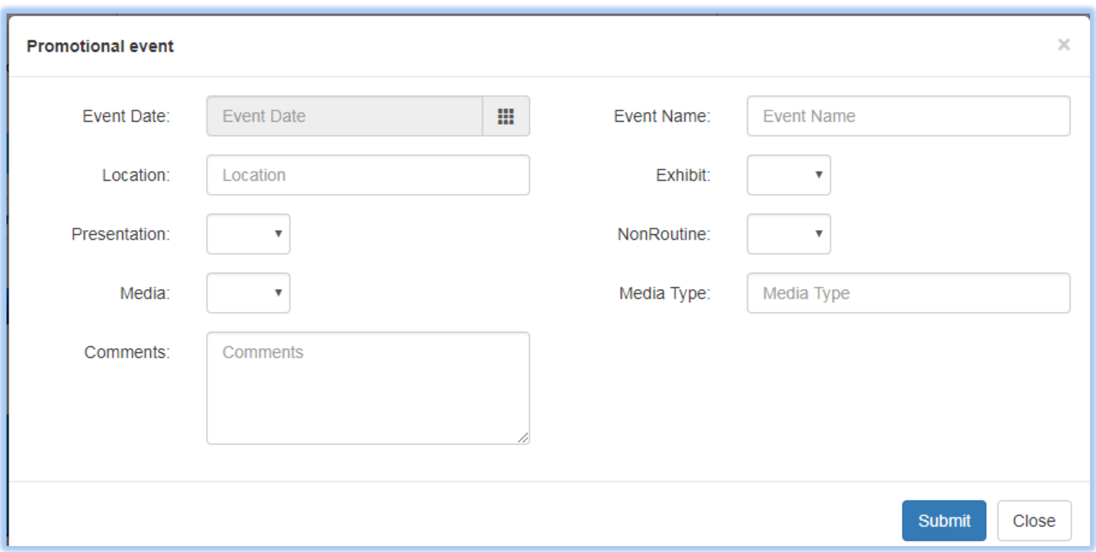
This section of the tracking form is used to enter promotional events conducted during the reporting month and to view training class data reported.

PROMOTIONAL EVENT LISTING

Add New Promotional Event

Date	Promotional Event Name	Location of Event	Exhibit	Presentation	Non-Routine Training Session	Media (If yes, enter Media Type)	Media Type	Additional Comments	Edit	Delete
3/19/2018	WIC Class`	High School	Yes	Yes	No	No				
3/8/2018	Fund Raiser	Accomack Fire Hall	Yes	Yes	No	Yes	TV, Radio, Social			

1. Promotional events data are displayed.
2. For current reporting month, each row may be **edited, deleted** or you may **Add New Promotional Event.**



3. If **Edit** or **Add New Class** clicked, this screen opens:
   a. **Event Date** – select/enter date of event (required)
   b. **Event Name** – enter Name of the event (required)
   c. **Location** – Enter location of event (required)
   d. **Exhibit** – select Yes/No
   e. **Presentation** – select Yes/No
   f. **Non-Routine** – select Yes/No
   g. **Media** – Select Yes/No
   h. **Media Type** – Enter media type
   i. **Comments** – Enter any comment about the class (optional)
   j. **Submit** – Click to save data entered/updated (required if you want to save information)
   k. **Close** - Close screen

Submit Tracking Form

When all data for a month have been entered (Seat Inventory transactions and Seat Applications and Application Review information) the Monthly Tracking Form is ready to be submitted.

The following steps must be performed prior to clicking the ***Submit Tracking Form*** button:

1. Open tracking form for the reporting month for the distribution site.
2. Click the ***Calculate/Recalculate*** button to calculate the tracking form totals. Note: you may do this as often as needed during month. The function will calculate and display tracking form summary information under each summary tab (Inventory Summary, Demographic Summary, Instruction Summary and Application Summary).
3. Determine if the closing inventory for the reporting month is correct.
    a. If yes, continue with next step.
    b. If no, determine problem – click **Show Inventory Detail** button under (Inventory Summary section) to see the inventory transactions included in the tracking form totals
        i. Enter or change transactions as needed in order to obtain correct ending inventory.
4. Complete the Inventory Certification (check yes/no and a comment if needed) on the **Inventory Summary** section of the tracking form and click **Save**.
5. If one or more seats issued, complete the section on the **Instruction Summary** section of the tracking form for Safety Seat Check Station and website referral (and click **Save**).
6. If one or more seats issued, enter the training classes conducted in the reporting month (date, number of participants and trainer(s). Enter multiple classes if more than one conducted.
7. Complete **Promotional Events** section of tracking form if event(s) conducted.
8. Click ***Submit Tracking Form*** button on tracking form
    a. You will receive an error if:
        i. (New in Release 2.4.8) You have transactions (seats distributed, inventory transactions, training classes) that were added since the last *Calculate/Recalculate Form Totals* was executed.
            1. If an error displays, you may choose the option to execute the Calculate/Recalculate Form Total function now.
            2. After the Calculate/Recalculate Form Totals function runs, certify your inventory (Save again) and complete/Save Instructional Summary Information.
            3. Submit the Tracking Form.
        ii. You have not certified the inventory (Step 4 above).
        iii. You have not completed the Instructional Summary (Step 5 above – if any seats issued)
        iv. You have not entered Training Class information (Step 6 above – if any seats issued).
    b. If no errors are detected, a message displays; click Yes to submit the tracking form; click No to cancel the process.

If tracking form is not “approved” by reviewers, the status returns to “Draft” and additional editing of date will be required.

After the tracking form form is submitted you may not enter any seat inventory or seat application information until the tracking form is fully approved and a new tracking form for the next month has been created. You may enter parent/guardian information for new applications.

Dashboard

The Dashboard provides a listing of all Tracking Forms for a site (or multiple sites). This list displays tracking forms by Month/Year, Health District and Site with most current month displayed at the top of the list. Fifteen entries are displayed per page.

To understand the Tracking Form Status, see Overview of the Electronic Reporting Process.

The Dashboard is used for the following reasons:

1. View list of all tracking forms (for a site, district or state) and the status of each tracking form.
2. View a specific tracking form.
3. Open and edit a tracking form in ***Draft*** status.
4. Review and approve (district coordinator or VDH manager only) a current tracking form submitted by a distribution site.
5. Determine the current status of a tracking form and next needed action.

Here is a sample of a Dashboard:

District: Select ... Site: Select ...

Month/Year: Jul 2016 Status: Select ...

Search Clear

District	Site	Month/Year	Status	Status Date	Next Action
Southside	Halifax County Health Department	7/2016	LHD Approved	15 Aug 2016	State Approve
Southside	Mecklenburg County Health Department	7/2016	LHD Approved	15 Aug 2016	State Approve
Thomas Jefferson	Albemarle/Charlottesville Health Department	7/2016	Draft	15 Aug 2016	Submit
Piedmont - 1	Nottoway County Health Department	7/2016	State Approved	15 Aug 2016	Closed
Piedmont - 1	Buckingham County Health Department	7/2016	State Approved	15 Aug 2016	Closed
Piedmont - 1	Cumberland County Health Department	7/2016	Submitted	15 Aug 2016	LHD Approve
Piedmont - 1	Lunenburg County Health Department	7/2016	State Approved	15 Aug 2016	Closed

1. Multiple tracking forms are listed:
   a. The second row (Mecklenburg County) displays a tracking form in **Draft** status.
      i. Clicking on **Draft** (Status column) will open the tracking form for additional editing.
      ii. Clicking Submit (**Next Action** column) will open the tracking form for submitting (by site reporter).
   b. The sixth row (Cumberland County) displays a tracking form in a **Submitted** status;
      i. Clicking on **LHD Approved** will open the form for reviewing/approval (by district coordinator.
   c. The seventh row (Lunenburg County) displayed a tracking form that has successfully gone through the entire approval process. Its status is **State Approved**.
      i. Clicking on **State Approved** or **Closed** will open the form for viewing only.

2. Dashboard Filtering
    a. You may ***filter*** the items that appear on the Dashboard. Filtering permits you to see only certain tracking forms; it is especially useful if you have many monthly tracking reports that span multiple pages.
    b. Five filters are available on the dashboard:
        i. Health District
        ii. Site
        iii. Month
        iv. Year
        v. Status
    c. To utilize a filter, select an item from one or more of the filter dropdown lists and click on the **Search** button. The filtered tracking forms are displayed.
    d. Please note that you must select a health district before trying to select a site. In the sample above, filtering has been applied so only tracking reports for the month/year specified are displayed on the Dashboard.
    e. The sample above show filtering by Month and Year; only tracking reports for July, 2016 are displayed.

3. Sorting Dashboard Tracking Reports
    a. You may also order (sort) tracking reports listed on the Dashboard by clicking on any of the column headings.

To order (or change the order of tracking reports) from lowest to highest (a-z) or highest to lowest (z-a), click on the column heading multiple times – each time you click, the sort order changes for the column clicked.

Reports

Monthly Distribution Tracking Report Summary

This report shows summary data for a specific site. If the user role is district coordinator, the report may be for the coordinator's district(s). VDH managers may run report for entire state, a specific district or a specific site. Only tracking forms with a status of **State Approved** are included in the report data.

Note: the user role and assigned site(s)/district(s) will determine what data are available for reporting.

To run the report:

1. Specify the ***Beginning Month/Year*** for report (select from dropdown lists).
2. Specify the ***To Month/Year*** for the report (select from dropdown lists).
3. Select the ***Health District*** for the report (select All or the district in the dropdown list).
4. Select the ***Distribution Site*** for the report (leave blank or specify site).
    a. To run by site, you must select the related Health District.
5. Click on ***Generate Report.***

Monthly Inventory Detail Summary

This report provides a grid of safety seat inventory data from the monthly tracking reports. User can specify beginning month/year, ending month year, Health District and distribution site.

To run the report:

1. Click ***Reports*** tab.
2. Select report ***Monthly Inventory Detail Summary*** (from dropdown list).
3. Specify the beginning ***Month/Year*** for the report (select from dropdown lists).
4. Specify the ending ***Month/Year*** for the report (select from dropdown lists).
5. Specify the Health District (if assigned to multiple). Select from the dropdown list.
6. Specify the Distribution Site (if assigned to multiple). Select from the dropdown list.
7. Click on ***Generate Report***.
8. After report displays data can be exported to Excel or PDF by clicking :

Monthly Promotional Event Summary

This report provides a grid of safety seat inventory data from the monthly tracking reports. User can specify beginning month/year, ending month year, Health District and distribution site.

To run the report:

1. Click ***Reports*** tab.
2. Select report ***Monthly Promotional Events Summary*** (from dropdown list).
3. Specify the beginning ***Month/Year*** for the report (select from dropdown lists).
4. Specify the ending ***Month/Year*** for the report (select from dropdown lists).
5. Specify the Health District (if assigned to multiple). Select from the dropdown list.
6. Specify the Distribution Site (if assigned to multiple). Select from the dropdown list.

7. Click on ***Generate Report***.
8. After report displays data can be exported to Excel or PDF by clicking: