Child & Teen Checkups (C&TC)

Early and Periodic Screening, Diagnosis and Treatment (EPSDT)

3 CATCH

USER MANUAL
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Child and Teen Checkups (C&TC)

CATCH 3 (C3) User Manual Update Log

This Update Log provides a record for updates to the C&TC C3 User Manual. This log will help users locate new changes quickly. Updated sections/pages will be identified below with a note to help identify the changes.

<table>
<thead>
<tr>
<th>Section/Page Numbers and Notes</th>
<th>Update Month/Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Front of C3 User Manual - Added Update Log Page</td>
<td>04/08</td>
</tr>
<tr>
<td>Table of Contents Page 4 – Added new page for Verifying Program Dates Instructions.</td>
<td>04/08</td>
</tr>
<tr>
<td>Backup Database Page 99 – Added additional language regarding C3 Backup Policy Instructions.</td>
<td>04/08</td>
</tr>
<tr>
<td>Verifying Program Dates Instructions Page 1 – Added instruction page on verifying program dates.</td>
<td>04/08</td>
</tr>
</tbody>
</table>
Acknowledgements

The CATCH upgrade project began in 2000. Long before that, however, information was gathered from counties that would assist in fixing and enhancing the CATCH II software, which was in use at the time. This county user information was utilized in programming the current CATCH 3 software. Many counties contributed to this effort. A committee met in 1999 to organize all the data collected over the years. Special thanks go to the following committee members:

Ramona Brady, Minnesota Department of Human Services
Julie Burns, St. Louis County
Miriam Dakutak, Clay County Health Department
Tina Full, Countryside Public Health Service, Chippewa County
Ann Hueller, St. Paul Ramsey County Department of Public Health
Jeanne Peterson-Price, Hennepin County Community Health Department
Cheryl Sapp, Clay County Health Department
Pearl Savage, Hennepin County Community Health Department
Jane Shaw, Anoka County Community Health and Environmental Services Department

Jim Berg began working with CATCH II in June of 2000. After the decision had been made in September of 2000 to produce a new software system, he created and programmed the CATCH 3 software. CATCH 3 was released statewide in January 2002. At the time, Jim Berg was an employee of Solution Design Group, Inc., 2910 Waters Road, Suite 100, Eagan, Minnesota 55121. DHS gratefully acknowledges all the hard work that Jim did to complete this project.

The following DHS staff assisted in the completion of this project:

Maternal and Child Health Assurance Unit:
   Ramona Brady, MCH Assurance Advisor,
   Susan Castellano, Manager, MCH Assurance
   Judy Ekern, Project Support
   Jane Shaw, C&TC Coordinator

Electronic Data Interchange Unit:
   Greg Anderson, Supervisor
   Steve Iverson, ITS 3 Programmer
   Cher Rudolph, CATCH support

Assisting in the process of testing the Beta version of CATCH 3 in June of 2001 were the following pilot county C&TC Coordinators and staff from:

   Becker County Multi County Nursing Service
   Big Stone County Countryside Public Health Service
   Carver County Community Health Service
   Dakota County Public Health Department
   Grant County Mid-State Community Health Services
   Hennepin County Community Health Department
Acknowledgements continued

- Kandiyohi County Community Health Service
- Mille Lacs County Community Health Service
- Olmsted County Health Department
- St. Louis County Health Department
- St. Paul Ramsey County Department of Public Health
- Sherburne County Public Health

DHS gratefully acknowledges all others, including the many county C&TC and IT staff who offered feedback and suggestions to improve the software throughout the user acceptance phase and statewide roll out process. DHS also acknowledges and gives special thanks to Hennepin County Community Health Department and St. Paul Ramsey County Department of Public Health for the assistance given for the completion of the CATCH 3 project through their financial support.
CATCH 3 (C3) Software Description

C3 was designed to assist in tracking C&TC Program administrative services. The C&TC Program has two service areas. The first is to provide comprehensive preventive health screening services for children under 21 (direct services), who are enrolled in medical assistance (MA) or MinnesotaCare. The second is to provide outreach and follow-up services (administrative services) to the enrolled population. Some of these administrative services, or activities, include informing eligible children/families about the C&TC Program, assisting with access to screening and follow-up services and maintaining documentation on participation.

C3 is a personal computer based software tracking system for part of the required administrative services of the C&TC Program. C3 uses a Windows format. The purpose of C3 is to track enrolled children eligible for services to assist county C&TC Coordinators and outreach staff in conducting and documenting outreach and follow-up activities to those families and children.

The C3 software generates standard introduction, reminder and re-notification letters to children and families to inform them about the C&TC Program, to offer assistance with appointment scheduling, transportation and interpretive services, and to remind them about periodic screenings. It also generates and tracks custom letters. C3 tracks all outreach contacts, such as letters, phone calls and face to face contacts. C3 tracks the families’ participation response, children’s screenings that are due and those received and any referrals associated with those screenings. It provides an array of standard reports on database information, offers users numerous query selections and the ability to create custom reports. C3 offers users ways to create and track single or multiple tasks and to assign them to themselves or others. C3 also includes built in “help bubbles” and “prompts” throughout the system.

Updated information on enrolled children and families is gathered on a monthly basis from MMIS and MAXIS at DHS. Health plans send screening and referral information (encounter data) monthly to DHS on an ASCII file. This updated information is compiled and distributed through a monthly download to county and tribal C3 users via Internet or dial-up modem. C&TC staff uses the updated information on families and children to assist in providing outreach and follow-up services. C3 allows users to change and track contact information, such as addresses, and enter specific case information, such as language and nationality. A note field is available for each case and the software keeps a case and child history, which is easily viewed.

The EDI unit at DHS offers technical support for C3. For assistance with technical questions or problems, contact Cher Rudolph or Bobbi Post at:

- E-mail: dhs.catchsupport@state.mn.us
- Telephone: 651-431-3305 (Cher)
- Telephone: 651-431-3098 (Bobbi)

For C3 function/user questions or C&TC Program questions, contact:

- C&TC Coordinator at 651-431-2625 or
- Ramona Brady at 651-431-2621, E-mail: ramona.brady@state.mn.us
The following are the minimum requirements for the CATCH software to function properly. C&TC agencies can purchase higher upgrades if desired unless otherwise noted.

Supported Operating Systems

Windows 2000
Windows XP

Recommended Microsoft Office Applications

Word 2000 or Word XP up through 2003 (The problems with the 2003 application have been resolved.)

Recommended Optional Microsoft Office Applications

Access 2000 or Access XP

Recommended Computer Hardware

Pentium IV 1.0 GHz or better.

512 megabytes to 1 Gigabytes or RAM (More memory is always better for efficient functioning, which is why we recommend 1Gig when possible.)

500 megabytes of free local hard disk storage and at least that much available on a network drive if a network is used.

17” or 19” monitor.

CD-ROM Drive

CATCH support recommends Laser based printers or DeskJet printers (CATCH support staff do not provide support for dot.matrix printers). CATCH requires printers with standard and True Type fonts. Please contact Cher Rudolph, CATCH support, at 651-431-3305 with questions.
General tips on moving around CATCH 3 windows:

- Pressing the Tab key will move cursor to the next control in the window. If user holds down the Shift key when pressing the Tab key, cursor will move to the previous control on the window.
- The default button on a window has a black border around it. If user presses the Enter key, the default button is chosen. The OK button in the example below is the default button.
- User may need to open MAXIS, MMIS or IS200 Series before opening C3 if both systems need to be running simultaneously.
- User may need to close all open programs before opening C3 to run and print letters.
- A button or control with a dotted border is the currently active control. This means that if user presses the Space Bar, the control will be activated.

The Don’t Use Automatic Mail Merge check box is the currently active control in the example below. User can click on the box or press the Space Bar to put a check in the check box.

- The Cancel button is the currently active control in the example below. Pressing the Space Bar will be the same as clicking on the button.

- To print a window in C3: While at the window, press and hold down Ctrl, Alt, Print Screen; then release. Go to document or e-mail and put cursor where C3 screen should be placed. Click Paste (clipboard) button.
To Login:

- Double-click on the C3 icon on desktop.
- When the C3 Login window pops up, type in User ID, and then type Password. (Press Tab key to move from User ID to Password.)
- Click the Login button or press the Enter key.

The Blue Title Bar at the top of the window displays the C3 Icon, and the Current User Name.

The C3 Menu Bar will appear at the top the window.

- The menu bar contains eight (8) menu options:
  - Cases: Open Case..., Open Case from Filter..., Add-Case...
  - Children: Open Child..., Open Child from Filter...
  - Letters: Batch Print Letters..., Print Pending Individual Letters..., View/Edit Letter Entries...
  - Reports: Run Report..., Create Custom Report..., Delete Saved Report Data...
  - Tasks: View Tasks..., Batch Assign Tasks...
  - User: Login..., Change Password..., View Currently Logged in Users..., Edit Users...
  - Utilities: Download Data..., Run/Edit Queries..., View/Edit Contact Type Codes..., View/Edit Contact Detail Codes..., View/Edit Clinics..., Backup Database..., Configuration..., Exit C3
The icon buttons under the main menu bar do not necessarily match up with the words on the menu bar. When user holds the cursor over a button, a description of the button appears. These toolbar buttons can be used to quickly access the main C3 functions.

**Cases (main menu bar):**

**To open a case by case #:**
- Click **Cases** in menu bar.
- Click **Open Case…** in drop down menu. The following window will appear:

```
Open Case by Case #

Enter Case #
|  
| OK  
| Cancel
```

- Type in the case number in the **Open Case by Case #** edit field.
- Click **OK** (or press **Enter** key).

**To re-open a case:**
- Click on drop down arrow at **Enter Case** field. A list of up to 20 of the most recently opened cases and children is available.
  - For example, a case will appear as follows in the list:
    PIEPENBURG, FAHIYM N [ CASE #: T4600700 - COR: HENNEPIN - CFR: HENNEPIN ]
    Notice that the Case # is listed after the case name.
  - For example, a child will appear as follows:
    PIEPENBURG, DACURY J [ PMI #: 24676976 - CASE #: T4600700 - PIEPENBURG, FAHIYM N - CFR: HENNEPIN ]
    Notice that the PMI # is listed after the name of the child.
- Click on the case or child to select and click **OK** to re-open it.
- **To close out of the window,** or any window, click **Cancel** or click on the **X** button in top right hand corner of window.
To open a case by name:
- Click on **Cases** then click on **Open Case from Filter**. A list of available filters will appear to left side of the window. (The filters offer different ways for the data in the database to be organized and viewed.) Click on any filter to run it.

- Some filters contain user options. When a user clicks on these filters, a window pops up to give user choices for filter query. Fill in information desired and click **Run**. It is not required to fill in all the options, nor is it required to enter any of the options.

To open a case by name when exact spelling of the name is known:
- Click on one of the following:
  - **All Cases by Name**, **Active Cases by Name** or **Inactive Cases by Name**.
  - A window pops up identifying type of filter and allows user to type in the case name.

- Click **Run** to bring up that case.

- Click on the case to select and then click **Open** or double click on the case to open it.
To open a case by name when the exact spelling of the name is not known:

- Type in a few of the beginning letters of the name followed by an asterisk.
- Click Run. This will bring up all the cases that begin with those letters. Then user can search for the case desired. These names will be in alphabetical order. (The more letters user can enter, the more CATCH can narrow the search.)
- If user opens a case and it is not the correct one, close the window by clicking on the X in top right hand corner of window.
- Click again on Cases and Open Case from Filter… and it will bring user back to the same spot as before so another case selection can be made from the same query.
- Click on Reload when ready to put in another name search.

To open a case using City/Zip/Name:

- Click on one of the following: Active Cases by City/Zip/Name All Cases by City/Zip/Name or Inactive Cases by City/Zip/Name. (These will also be in alphabetical order.) An Active Cases by City/Zip/Name window will appear.

  ![Active Cases by City/Zip/Name Window]

- Type in desired zip code, city and name or alphabet letter(s) and asterisk.
- Click Run.
- If user wants all names in that zip code and city, just leave name blank and click “Run”.
- Click on the case to select and then click on “Open” or double click on the case to open it.
To add a case:

NOTE: Adding cases is not a requirement and is not recommended. New cases will come to counties in the monthly downloads and are not official for CATCH users until then.

- Click on Cases, click on Add Case… in the drop down menu.
- A window called Create Case will appear. Type in case information, click on Save button to add case.

- When user clicks on Save, a Confirm box will appear asking the user to verify that the case # entered is correct. (Incorrect case numbers cannot be changed and will remain on the system.)
- Click OK or Cancel.
- If user chooses OK, a new case will be created.
- If the user chooses Cancel, the entry will not be saved.

- Important: when adding a case, be sure that the new case number is correct because this number CANNOT be edited. Other fields will be updated by future download.
When the new case window appears, user can add the contact information, i.e. address, telephone number, according to instructions under **Case Window, Contact Information**.

**Case Window:**

The **Blue Title Bar** at the top of the window displays **Case Name, Case #, COR** (County of Residence) and **CFR** (County of Financial Responsibility).
Case Report...: click this button to display the Case Report window with the case selected for printing. It allows user to select all or portions of the case for printing. When selections are made, click Run to preview report before printing. To print report, click print button in upper left corner.

Note: Users can copy any C3 window. While at the window, press and hold down Ctrl, Alt, Print Screen; then release. Go to document or e-mail and put cursor where C3 screen should be placed. Click Paste (clipboard) button.
Contact Information Box:

The current case address and phone number are displayed.

To view a previous address, enter a new address or edit the current address:

- Click on View/Edit Address History button. The window below will appear:

- Address Entry History box: Shows current address at top and previous addresses, following in order of date and time added to the system.
• **Bring to Top button:** User can highlight any address on the history list and click this button to bring selected address to the top of the list. This address then becomes the current address and is seen in the Contact Information box. All letters will be sent to this address.

• **Address box** (right): User can enter new address/phone or edit an existing address/phone.

**To enter new address:**
- Enter new address and phone number in space available.
- Click **Insert**. This address will now be added to the **Address Entry History**.
- Click **Close** to view new address in **Case** window.

**To edit current user entered address:**
- Make necessary address changes.
- Click **Overwrite**.
- Click **Close** to view edited address in **Case** window.

**Note:** User will only be allowed to edit/overwrite addresses that are user entered. Addresses that are system generated cannot be edited. Also, any address that has a letter generated to it or has an outreach contact attached to it and is documented in C3 will not have overwrite capability in order to preserve data documentation. (User may still change the address by adding a new one. That way the new address will be in the system and the old address will be documented in history.)

**Case Info tab:** Availability of some of this information depends on what information was gathered during the application process and is available to be included in the download.

- **Financial Worker #, Financial Worker Phone, Financial Worker Name:** User can add or change Financial Worker information if known. This information should be available initially about intake worker. C&TC staff can choose to update these fields as information changes.
- **Nationality (case):** If Nationality field is blank or incorrect, user can add or change by choosing from drop down menu.
- **Language:** If Language field is blank or incorrect, user can add or change by choosing from the drop down menu.
- **Race:** If Race field is blank or incorrect, user can add or change by choosing from the drop down menu.
- **Ethnicity:** If Ethnicity field is blank or incorrect, user can add or change by choosing from the drop down menu.
- **Interpreter Needed:** This field is not populated through the download. County staff can click on box to add or remove this information.
- **Primary Care Clinic:**
  - If no clinic is shown, user can choose from drop down menu, highlight choice to bring to top.
  - If clinic to be added is not on the list, click on **Add Clinic** button.
  - The following **Edit Clinic** window will appear allowing user to enter the new clinic information.
Enter the name of the clinic in the Description field and click Save to add a clinic.
The code for the clinic will be automatically filled in by the system.
- Clinic will be added to the list and will automatically be inserted for the case.

To save case edits, click Save.

**Note:** User must save case edits before trying to save an outreach activity for this case.
White case information fields are the only fields that can be changed or filled in by county staff.
These fields will not be overridden by the download if they were last edited/updated by county staff. All fields will be updated by the download that have not been edited by county staff. This includes blank fields; if information is now available. When county staff populate a field, they assume responsibility for updating that field. (C&TC staff should work with their income maintenance or economic assistance staff to encourage maintenance of current case information.) If the case was entered into C3 by county staff prior to the download, all fields will be updated to what is contained in the download. DHS gives the download information precedence in this case. If the user wants to make sure certain information is not changed, add a task for the case to check on this after the download date. See **Tasks** section.

**Added Date:** This is the date that the case was added by the download. Cases added by C&TC staff will not show a date in this field. This date will be filled in for the case when it comes through on the download. (Cases added by staff will have an internal date attached so that letters, contacts, etc. can be handled as usual.

**Wants C&TC:** This field will be filled in as Undecided with the download. (This field cannot be edited from the case screen.) After doing outreach to the case and determining the interest in participation, a Yes or No response can be entered when filling in the detail information for the outreach contact. **C&TC staff should not assume a Yes (or No) response if the case contact was not reached. In that situation, in order to maintain data integrity, the case should remain Undecided.**

**Children on Case:** Children associated with the case are summarized at bottom of the case window. The total number of children on case is displayed. User can easily view the individual child’s PMI #, Active/Inactive Status (Y/N), Active Begin Date, Active End Date, Child’s Name, Birth Date, Age, Gender, Relationship to Child and Health Plan, if known.
To Add a Child to the Case:

**Note:** It is not required to add a child. New children will be added to cases via the download process.

- Click on “Add Child” button and a “Create Child” window will appear.

```
PMI #:  
Case Relationship to Child:  
Last Name:  
First Name:  
Gender:  
Major Program:  
Health Plan:  
Birth Date: 11/25/2001  
```

- Type in child information and then click on Save button to add child to case.
- A PMI confirmation window will appear. Click OK to add child to case.

```
Confirm:  
You are about to save PMI #. Are you sure that the PMI # is correct? You cannot change the PMI # once it is saved, so please take the time to verify that it is correct. Click OK to save, or Cancel to verify that the data is correct.  
```

- Child’s name and information will appear under Children at the bottom of the case screen. Double click on child’s name to view the new child window.
Enter Outreach Activity Tab:

- This tab is next to the Case Info tab. Click on Enter Outreach Activity tab to display. This tab is where all outreach activity is documented.

To enter an outreach activity:

- Click on Outreach Activity down arrow and choose from drop down menu to describe main reason for activity.
- Click on Contact Type down arrow and choose from drop down menu to describe how the contact was made to the individual (telephone, face-to-face or written).
- Current user name will appear in Contact By box.
  - If appropriate, can change user from current user for a specific contact by clicking on down arrow by Contact By and highlighting another user from drop down list of names.
- Today’s date will appear in Activity Date box. **To change date,** if date of contact is different from date of entry:
  - Click on down arrow by Activity Date.
  - Click on the desired contact date.
- **If contact is unsuccessful (family not reached):**
  - Click on Contact Failure Reason down arrow.
  - Click to select appropriate reason. (For example, Phone/No Answer.)
  - Click on Save. Contact documentation complete.
- **If contact is successful (family reached):**
  - Do not select from Contact Failure Reason. Leave blank.
  - Click on Next (or click on side tab Detail) to bring up detail window.
  - Click to select any single item or combination of items in detail list to describe the contact. If necessary, click again to remove detail item if chosen in error.
• If notes are not needed:
  ▪ Click Save. Documentation is now complete. A refreshed (blank) box will appear for the next contact.

• If notes are needed:
  ▪ Click Next (or click on side tab Notes).
  ▪ Add as many notes as you need. Note field is unlimited. This information will be stored in case history.
  ▪ Click Save. Documentation is now complete. A refreshed (blank) box will appear for the next contact.

• Create Task on Save: Click here to create a reminder task while entering an outreach activity. If the task is specific to the child, click Include PMI # with Task button, then click Save. A C3 window will appear identifying that user wants to create a task. Click OK. The Create/Edit Task window appears. User can then create a task as described in the Tasks section under Other Ways to Assign Tasks.
Under **Contact Detail** there are three participation choices; **Yes, No and Undecided**. The program will only allow you to choose one of these. When you click on the **Save** button, this information will appear on the case window under **Wants C&TC?**. The change to **Wants C&TC** will be made when the case is closed. User will see the change when re-opening the case.

If the client response changes at a future date, choose the correct response when entering the contact detail.

**IMPORTANT POLICY NOTE:** The policy for documentation of participation responses has changed. As usual, all new cases will be downloaded as **Undecided**. However, in order to keep documentation accurate, **only record a participation response if direct communication has occurred with the family**. Please do not assume a **yes** response if no contact with family has been achieved. User cannot know a family’s actual participation response without direct contact. By keeping responses factual rather than assumed, the resulting reports from C3 will be accurate and far more useful to the user.

If user clicks the **Save** button before entering all of the required outreach activity information, an error dialog window will appear, informing user what information is still needed. (Also, by holding the mouse cursor over the “Save” button information will display indicating if activity can be saved as entered or if more information is needed.)
To edit or change a contact: User will need to be in the case History (See History/Contact Documentation section following.)

- Double click on the contact in Outreach History to bring up the Edit Outreach Activity window.
- Make necessary changes; click Save button to save changes.

History/Contact Documentation: This is where user can view all case contacts.

To view case outreach history:

- At case view window, click on Enter Outreach Activity tab.
- Click on History button (right middle of folder) to view all case contacts.
- An Outreach History for...(case name) window will appear. This offers a tree view selection of different ways to view the contact history.

Click on View By drop down menu to choose desired view. User can view by Activity Date, Activity Type, Contact Type or by Contact Detail.

- Information will be displayed below under Outreach Activity box.
- Click on Activities For drop down menu to choose and view child related contacts. (System defaults to Entire Case and will always show that first).
• Click on the activity to highlight it and the detail will appear in the Outreach Activity Detail box to the right. This is the information that the system or the user has entered about the contact.
• Click on any contact to view detail information about that contact.
• When user clicks on a reminder letter contact, the Letter Type bar (under Outreach Activity Detail for that contact) will display the reminder letter year, for example, “8 year”. The PMI#/Child Name bar will display the PMI and Child’s name that is printed on the reminder letter.
• At the top right part of the window, there are two buttons. They will become activated if there are contacts in the history for the case or child. One is a single figure with an arrow, which will bring up the child window if the contact refers to a child. The second button has more than one figure with an arrow, which will bring up the case if the contact refers to the case.
• All other letters will display only letter type.

Children (main menu bar):

To open a child by PMI #:
• Click Children in the menu bar.
• Click Open Child…

The following window will appear:

![Open Child by PMI #](image)

• Type in the PMI # in Open Child by PMI # edit field.
• Click OK (or press Enter key).

To re-open a child window recently opened:
• Click on the drop down arrow. This list displays up to 20 child (and case) windows that were most recently opened.
• Click on child to select, then click OK (or user can double click on the child’s window) to re-open it.
To open a child from filter:

- Click on Children, click on **Open Child from Filter**.... A list of available filters will appear to the left side of window. The filters offer different ways for the data in the database to be organized and viewed. Click on any filter to run it.

![Open Child from Filter](image)

- Click on one of the following: **Active Children, All Children or Inactive Children** and children will appear in order of PMI #. Highlight a child and click **Open** or double click on the chosen child to bring up the child’s window.

To open a child by name if the exact spelling of the name is known:

- Click on one of the following: **Active Children by Name, All Children by Name Active Children by Name/Birth Date or Inactive Children by Name**.
- An **Active Children by Name** window appears allowing user to type in the child’s name.

![Active Children by Name](image)
• Click **Run** to bring up that child.

**To open a child by name if the exact spelling of the name is not known:**

• Select one of the **By Name** filters.
• Type in a few letters of the name followed by an asterisk (*).
• Click **Run** to bring up all the children with names beginning with those letters. (The more letters user can enter, the more C3 can narrow the search.)
• Search for the child, highlight name and click **Open** (or double click on child name) to bring up that child.
• If user opens the wrong child, close the window.
• Click again on **Children and Open Child from Filter**… and it will bring user back to the same query, so another choice can be made.
• When/if user is ready to put in another child name search, click on the **Reload** button to pop up the **Active Children by Name** window again.

When at a case with one child window open, if user double clicks on another child in that case, a **Select Where to Open PMI number** window appears.

**Open Selected Child in an existing Child View window**: Click here to replace the first opened child window with the second chosen child window. User will now only have one child window open.

**Open Selected Child in a New Child View window**: Click here to open an additional child window. User will now have two child windows open.
Child Window:

The Blue Title Bar at the top of the window displays Child Name, Child PMI #, Case #, Case Name, and CFR (County of Financial Responsibility).

Clicking the Child Report button on the child’s window will bring up the Child Report window. This will show the Child’s Name, PMI #, Case # and Case Name. It offers user options for choosing a full or partial report. When report choices have been made, click Run. User can then view report to verify that the needed information is included before printing.

Case Contact Relation to Child: defaults to parent.
- If user knows that case contact is not the child’s parent, this field can be edited by clicking on one of the drop down menu choices.
- This will activate the Save button. Click Save to change case relation to child on case view window.
- The only way to indicate that the child is a foster care child, user must change the “Case Contact Relation to Child” field by clicking on the down arrow and choosing the “Foster Care Parent” option. Foster care data is user entered and only indicates that the child is or was in foster care.

Child view window also indicates Gender, Birth Date, Age (if child is under 2, age will appear in months and days. If child is older than 2, age will be shown in years and months), Major Program
(MA: medical assistance, MC: MinnesotaCare), Next Screening, Screening Due Date, child’s Nationality, child’s Race, child’s Health Plan if known, Active status, Begin Date and End Date.

**NOTE:** Active status indicates that the child is eligible for C&TC outreach in user’s county. A child may be inactive in one county but still MA/MinnesotaCare eligible and therefore active for C&TC outreach in another county. When a child moves from county A to county B, county A remains the County of Financial Responsibility (CFR) for 60 days. The CFR county is responsible for doing outreach and follow up while they are the CFR. At the end of 60 days, the child will appear in the next CATCH download in county B which then becomes the CFR.

**Screening History:** Shows child’s screening history, including: Service Date, which Screening was received, Age of child at the time of the screening, if there was a Referral Yes = Y, No = N, or Incomplete = I (Incomplete means a well visit not billed as a C&TC; represents incomplete visits), Date Completed (referral), child’s Health Plan for that screening if known, Clinic Name, Clinic Phone, Provider Name and Provider #.

**To view other children on case:**
From child view window, user can view other children in the case by clicking on the Prev Child or Next Child buttons located at the top of the child screen.

**To view case from child window:**
Click on Show Case button.

**Edit Outreach Activity:** This is the same as the Edit Outreach Activity folder on the case view window. It allows the user to enter case outreach from either window.

**Note:** All outreach activity is case related. One contact is entered (counted) whether one child or all children were part of the contact.

**Create Task on Save:** Click here to create a reminder task while entering an outreach activity. If the task is specific to the child, click Include PMI # with Task button, then click Save. A C3 window will appear identifying that user wants to create a task. Click OK. The Create/Edit Task window appears. User can then create a task as described in the Tasks section under Other Ways to Assign Tasks.

**History:** Click here to view the letter history of the child. (The only contacts specific to the child will be reminder letters or custom letters. Other contacts involving the child will be part of the case history. For example, one telephone call to the family is considered one contact, even if outreach is done to more than one child.)

- An Outreach History window appears in tree view format. This is the same as in the Case Outreach History.
- When at the child view window, the history defaults to that child. As in the case outreach History, the user can choose to change the view to other children in the case or to view the entire case.
Referral follow-up on child screening:
- Enter outreach activity for the referral follow-up phone call.
- When entering **Detail**, if the referral was accomplished, click on **Referral Accomplished** in the **Detail** list. (Scroll down).

**Note:** A referral is considered **Accomplished** if user learns during the follow-up telephone call that the child was seen by a provider for the referral reason identified at the initial C&TC screening.
- When user finishes entering this contact and clicks on **Save**, the following **C3** window will appear.

- **Click OK.**

The **Set Referrals Accomplished for a Case** window below will appear. (**Note:** Only screenings with referrals will be shown here.)
- Set date that referral was completed. To do this, click on down arrow by **Completed Date** and select date by clicking on it.
- Click on the screening date that referral was accomplished to highlight it.
- Click on **Mark Selected Screenings**.
- This will enter the referral **Date Completed** next to the highlighted screening.
- Click **OK.**
Note: Because of confidentiality issues, screening/referral information will not be shown on children 11 and older. The 11 and older screenings and referrals will be counted, however, in the Outreach Activity Summary Report. County outreach staff should only do referral follow-up on children up to age 11.
Letters (main menu bar):

There are 4 standard letters in CATCH:
1. Introduction Letter
2. Reminder Letter for a child
3. Parent a Child (PAC) Reminder Letter
4. Re-Notification Letter

DHS Sample – Introduction Letter

May 1, 2008

Dear «Case_First_Name» «Case_Last_Name»,

Child and Teen Checkups (C&TCs) provide health care for children and teens under the age of 21. C&TCs are a benefit of Medical Assistance and MinnesotaCare. This letter is to notify you that enrolled children and teens in your household can get C&TC health checks. Children and teens enrolled with a health plan must get C&TC services from that health plan.

Regular health checkups are important to stay in good health. These checkups help find and treat health problems early. A C&TC health check includes; a physical, shots and lab tests if needed, vision and hearing checks and information about healthy lifestyles.

More information about C&TC health checks is included with this letter. We can help find a doctor or clinic or make an appointment for you. If needed, we can also help you find a ride to the checkup or an interpreter. Reminders are sent whenever C&TC health checks are due.

It’s easy! Just ask for a C&TC when making the appointment. Be sure and bring the insurance card with you to the clinic and remember to let the clinic know if for some reason you can’t keep the appointment.

Dental checkups are also a benefit of Medical Assistance and MinnesotaCare. Children and teens can get dental checkups every six months starting at 3 years of age.

If you have questions or need help, please call us at <county C&TC number>.

Sincerely,

<name/names>
<titles>
<address>
<tel. number>

If you ask, we will give you this information in another form, such as Braille, large print or audiotape.
DHS Sample: Re-notification Letter

May 1, 2008

«ACTIVITY_ID»

«Case_First_Name» «CASE_MI» «Case_Last_Name»
«Address1» «Address2»
«City», «STATE» «ZIP»

Dear «Case_First_Name» «Case_Last_Name»,

Child and Teen Checkups (C&TCs) are a benefit of Medical Assistance and MinnesotaCare. This letter is to re-notify you that enrolled children and teens under age 21 in your household can get C&TC health checks. Children and teens enrolled in a health plan must get C&TC services from that plan.

Regular health checkups are important to stay in good health. C&TC health checks help find and treat problems early. A C&TC health check includes; a physical, shots and lab tests if needed, vision and hearing checks and information about healthy lifestyles.

We will send reminders when C&TC health checks are due. If needed, we can help you find a doctor or make an appointment. We can also help you find a ride or an interpreter.

When making an appointment, just ask for a C&TC. Be sure and bring the insurance card with you to the clinic and remember to let the clinic know if for some reason you can’t keep the appointment.

Dental checkups are also a benefit of Medical Assistance and MinnesotaCare. Children and teens can get dental checkups every six months starting at 3 years of age.

If you have questions or need help, please call us at <county C&TC phone number>.

Sincerely,

<name/names>
<titles>
<address>
<tel. number>

If you ask, we will give you this information in another form, such as Braille, large print or audiotape.
DHS Sample: Reminder Letter

May 1, 2008 «ACTIVITY_ID»

«Case_First_Name» «CASE_MI» «Case_Last_Name»
«Address1» «Address2»
«City», «STATE» «ZIP»

Dear «Case_First_Name» «Case_Last_Name»,

Regular Child and Teen Checkups (C&Ts) help keep children healthy. This is just a reminder that it’s time for «Child_First_Name» to receive his «REMINDER_PERIOD_DESC» C&TC health check.

C&TC health checks are a benefit for children and teens under age 21 who are enrolled in Medical Assistance or MinnesotaCare. Children and teens enrolled in a health plan must get C&TC services from that plan.

Regular health checkups are important to stay in good health. C&TC health checks help find and treat problems early. A C&TC health check includes; a physical, shots and lab tests if needed, vision and hearing checks and information about healthy lifestyles.

If needed, we can help you find a doctor or make an appointment. We can also help you find a ride or an interpreter.

Remember to ask for a Child and Teen Checkup when you make the appointment. Please bring your insurance card with you to the clinic and remember to let the clinic know if for some reason you can’t keep the appointment.

Dental checkups are also a benefit your child can receive through Medical Assistance or MinnesotaCare. Children should have a dental checkup every six months starting at 3 years of age.

If you have questions or need help, please call us at <county C&TC phone number>.

Sincerely,

If you ask, we will give you this information in another form, such as Braille, large print or audiotape.
May 1, 2008
«ACTIVITY_ID»

«Case_First_Name» «CASE_MI» «Case_Last_Name»
«Address1» «Address2»
«City», «STATE» «ZIP»

Dear «Case_First_Name» «Case_Last_Name»,

Child and Teen Checkups (C&TCs) provide health care for people under age 21. These health checks are a benefit of Medical Assistance and MinnesotaCare. This is just a reminder that it’s time for your C&TC health check. If you are enrolled in a health plan you must get C&TC services from that plan.

Regular health checkups are important to stay in good health. C&TC health checks help find and treat problems early. A C&TC health check includes; a physical, shots and lab tests if needed, vision and hearing checks and information about healthy lifestyles.

When making an appointment, just ask for a C&TC. Be sure to bring your insurance card with you when you go to the clinic and remember to let the clinic know if for some reason you can’t make the appointment.

If needed, we can help you find a doctor or make an appointment. We can also help you find a ride or an interpreter.

Regular dental checkups are also a benefit for you. You can get dental checkups every six months.

If you have questions or need help, please call us at <county C&TC phone number>.

Sincerely,

<name/names>
<titles>
<address>
<tel. number>

If you ask, we will give you this information in another form, such as Braille, large print or audiotape.
To run/print standard letters:
  - Click on **Letters** in menu bar.
  - Click on **Batch Print Letters…**

The **Batch Print Letters…** window has two data grids. The one on the left, **Available Batches**, displays a list of all the generated batches.

**Available Batches**: Grid column descriptions:
  - **Batch ID**: A system-generated number that simply identifies the batch. A **Pending** batch has no number assigned to it. This is where all of the letters, created during entering outreach activities, are stored. Selecting letters from the **Pending** batch is the same as selecting **Print Pending Individual Letters…** from the **Letters** menu on the main **C3** menu bar.
  - **Prepared Date**: The date that the batch was created. **Note**: A standard batch date is set to midnight of the day that the batch was created. This means that the date of the batch will appear as the day following the date that the letters were actually generated.
  - **Std.**: This is an abbreviation for **Standard** letter batch. The **Y** next to a batch means **Yes**, the batch is standard and the **N** means the batch is **not** standard and is therefore a **Custom** batch.
  - **Total**: Displays the total number of letters contained within the batch.
  - **Unprinted**: Displays the number of letters that have yet to be printed within the batch.

The data grid on the right titled **Available Letter Types in Selected Batch** displays the contents of the batch of letters that is selected (highlighted) in the **Available Batches** grid.
Available Letter Types in Selected Batch - Grid column descriptions:

- **County:** The county to which the letters belong. This is only meaningful to multi-county installations.
- **Letter Type:** Displays the type of letter.
- **Total:** Displays the total number of Letter Type in the batch for the County.
- **Unprinted:** Displays the total number of Letter Type not printed for the County.

To Run C3 Standard Letters:

- While at the Batch Print Letters window, click on Create Standard Letters Batch.

**Important Note:** User can print standard letters on the same day that the download occurs, but user must create the standard letter batch AFTER the download since only one standard letter batch can be created per day. If a letter batch is created before the download, then user will have to wait until the next day to prepare the download letter batch.

- Click on Start to create standard letter batch. Progress of letter preparation will be shown in the 3 bars of the window.
- Letter batch will appear in Available Batches box in Batch Print Letters Window.
- When C3 is finished with the letter preparation, a window will appear asking if user wants to print right away.
- Click on Yes to print.
  - C3 will open up Select Letters for Printing from Batch window.
  - Batch just prepared will now be inserted in the Selected Letters column.
  - Click Print Letters.

- If user clicks on No, the batch will remain in batch list and show letters as not printed.
  - To print at a later time, click on Letters, then Batch Print Letters.
  - Highlight selected batch for printing.
- Click on **Select Letters for Printing from Batch**.
- Letters will appear under **Selected Letters** column.
- Click **Print Letters**.

To print a report for this batch, click on **Run Letter Report**.

- The **Letters Generated Report** window will appear from the Report List (under **Reports**, **Run Reports**).
- The report defaults to:
  - **All Letter Types** under **Select Letter Type**,
  - **All Counties** under **County** (for multi county CHBs sharing a database) A drop down arrow will give user choice of individual counties.
  - The name of the single county/tribe (un-highlighted, because there is nothing to choose) under **County**,
  - **All workers** under **Worker**,
  - **Unprinted Letters** under **Select Printed Status** and
  - **All Letters** under **Selected Status**.
- The chosen sort order will display in Sort Order box.
- If user chooses the default report, click **Run** to view or print report.

User can change the default report by making choices from the available dropdown options. To change sort order options, click on **Change Sort Order** and follow instructions below.
**Change Sort Order:** This gives user options for sorting letters for printing according to a **Selected Sort Field** list. The following window will be displayed:

- Highlight a sort option under **Available Sort Fields**. This will activate left arrow. Click on left arrow to move choice from **Available Sort Fields** to **Selected Sort Fields** column. Move as many entries as desired.
- To remove choices from **Selected Sort Fields** column back to **Available Sort Fields** column, click right arrow.
- To change the order of the **Selected Sort Field** list, highlight entry and click arrow up or down to move item. Arrows will only be active if you can move the entry any further in the direction of the arrow.
  
  - **The Ascending/Descending (AZ) sort order button** on left of window allows user to toggle back and forth between ascending and descending sort order. Ascending order is indicated by a (+) next to the field name. Descending order is indicated by a (-) next to the field name. Examples of how **AZ** works:
    - Ascending order, when used with birth dates, will sort from oldest to youngest. (Older children’s birth dates happened first).
    - Descending order, when used with birth dates, will sort from youngest to oldest. (Youngest children’s birth dates happened last).
    - Names, cities, etc. are alphabetically sorted.
    - Numbers are sorted 1-9 or 9-1.
  
  - **The print pause button** (at bottom left of **Select Sort Order** window shows two stacks of letters) allows user to pause printing process at selected intervals. This will be useful in assisting staff to separate out sections of a print job. For instance, counties can use this option to assist in separating out the different age groups of children when printing reminder letters, making the job of adding age appropriate materials much faster.
To use print pause option:

- Highlight the sort order entry where user wants print process to be paused.
- Click on the **Print Pause button**. An asterisk will appear next to the sort order entry, indicating that at the point that the value of this field changes during printing, the process will be paused. For example, if pausing at language, the printing process will stop at each point when the language changes.
- Users can pause printing at any or all sort order options, by repeating this process.
- When user has desired sort order and print pause options, click **OK**.
- After clicking **OK**, the chosen sort order will be moved to **Select Letters for Printing** window.
- Click **Print Letters**.

**Note**: Sort order will be maintained in C3 until the user changes it. For standard letter batches, the sort order will be maintained for all batches. For custom letters, the sort order is saved for each specific custom letter batch.

**To choose only selected letters from a batch**: Move the letter selected letter batch from the **Selected Letters** column to the **Available Letters** column by clicking on the double arrows pointing to the right (>>).

- To select a batch letter, highlight the selected letter and click on the single arrow pointing left (<) to move the letter to the **Selected Letters** column.
- To highlight more than one letter, hold down the control key and click on the desired letters. Then click single left arrow. (<)
- When the correct letters have been selected, click on **Print Letters**.
- To move a single or group of letters off the **Selected Letters** column, click to highlight the letter(s) and click on the single arrow pointing right (>).
To track returned C3 letters:

- Click on OA# (Outreach Activity Number) button (below Tasks on main menu bar). An Open Outreach Activity window will appear.
- Type in the returned letter’s Outreach Activity number.

Note: Every outreach activity is automatically assigned a number for reference. The letter’s Outreach Activity number will be found on the letter above the address and will show through window envelope.

VERIFY that the letter number typed in is correct.
- Click Open.
- C3 will open the letter’s outreach activity contact. The Contact Failure Reason and Create Task on Save choices will be activated.
- Enter the Contact Failure Reason (why letter was returned).
- Click Save.
- A Confirm window appears asking if user would like to open the case of the outreach activity just edited. Click Yes to open case or No to close window.
- The information on letter results can be viewed under the outreach activity letter contact found in the individual case History or be retrieved collectively, for the year and by county, through the Letter Results Report in the reports list under Reports, Run Report.
Custom Letter Batches:

Please be careful not to create a letter batch you do not intend to send. Any letter batch created will have outreach contacts assigned to the case, whether or not the letters are printed. The system assumes that if you create a letter batch, you intend to print/send it. If a letter batch is mistakenly created and not sent, you will need to adjust your annual report numbers accordingly.

Create a custom letter (see pg. 45)

To run Custom Letters Batch:

- Click on **Letters** in the main menu bar
- Click on **Batch Print Letters**
- Click on **Create Custom Letters Batch**. A Run Queries window will appear.

- Choose from available queries on the left by clicking on the query to highlight it. This will activate the Run Query button.
- Click on Run Query.
  - A small window will appear, offering query choices. Complete available fields as desired.
  - Click **Run**. The selected query choice will run and query results will be displayed, showing number of records in the query. Always note the number of records in the query **before** choosing to create letters.
- If the query run is satisfactory, user is now ready to choose letter template
- Under **Letter Template**, select desired custom letter by clicking on it. (Drop down arrow will display list.) This will bring selected custom letter to the top bar.
- Click on appropriate **Outreach Activity Type** on drop down menu to indicate the reason user is sending the letters.
- Click on appropriate detail descriptors from **Contact Details** drop down menu.

- Click on **Create letters**.
  - A progress bar and other indicators will show that letter batch is being created.
  - A **Confirm** window will appear asking if user wants to print letters.
  - If user clicks **Yes**, the **Select Letter for Printing** window will appear. The letters that were generated will appear under **Selected Letters** column.
  - Click **Print Letters** button.
  - If user clicks **No**, the created custom letter batch will show as **Pending** under **Available Batches, Batch ID** in the **Batch Print Letters** window.

**To print custom letter batch from batch list:**
- Click on **Batch Print Letters** and click on custom letter batch to highlight it.
- Click on **Select Letters for Printing from Batch** and use arrows to move batch to **Selected Letters** column as described earlier.
- Click on **Print Letters**.

**Note:** From **Run Queries**, user can also create a custom report (See **Custom Report** section) or assign tasks (See **Assign Tasks** section).

**To print a single custom or standard letter to a case or child from Case or Child window:**

**Before you can print a custom letter, one has to exist in the system (see pg. 45)**
- At the case view window, click on the **Enter Outreach Activity** folder tab. (The child view window already has the **Edit Outreach Activity** box displayed.)
- Click on appropriate **Outreach Activity** to indicate what activity the letter references.
- Click on appropriate **Contact Type**.
- Click on **Detail** and choose appropriate letter type (custom, standard).
- Click on **Save**.

- A **C3** window will appear with the message that user wishes to not only save an activity but to also send a custom letter. Click **OK**.
- A **Select Letter** box allows user to select **Letter Type** (Drop down menu).
- If a **Reminder Letter** is to be sent, choose child name from down arrow list.
- Click on **Save**.

- Window will appear asking if user wants to print now or save to pending letter batch.
- If user clicks **Yes** letter will be added to **Select Letters for Printing** window list. Click **Print Letters**.
• If user clicks No, letter will be added to Pending Letter list and can be printed later.

• To print single pending letter, choose Print Pending Individual Letters… under Letters in main menu bar to bring up Select Letters for Printing window. (User can also select the Pending batch from Batch Print Letters, under Letters in the main menu bar.)
  ▪ Pending letters will show by the name of the worker who created them.
  ▪ User can highlight letter to select.
  ▪ Click Print Letters button to print.

Note: Possible reasons to select a standard letter for a single mailing from Case” or Child windows:
  • The letter was returned due to an incorrect address, etc. and needs to be sent using the corrected address.
  • A family has come back on the system after a long period and user wants to send out a new Introduction letter/information packet.
  • In the case of the returned letter with the wrong address, user would have to be at the case to correct the address before re-mailing. (Batch letter addresses, once generated, cannot be edited).

View/Edit Letter Entries:
  • Click on Letters in menu bar.
  • Click on View/Edit Letter Entries in drop down menu and a View/Edit Letter Template Entries window will appear.
  • Copy to Other County feature will appear on multi-county databases only.
To view/edit existing letters (standard, custom):
- Click on letter to highlight/choose.
- Click on Open File. Selected letter will open in Microsoft Word.
- Use Microsoft Word to edit letter.

Note: If changes are made to the body of the standard letters, check that the readability level has not gone above 7th grade. All written communication with clients should not exceed the 7th grade reading level.

To add a new field to letter templates to a standard or custom letter format:
- Click with the mouse at the spot in the letter template where the field should be inserted.
- Then click the down arrow for Insert Merge Fields and highlight the field desired. It will automatically be inserted at the point where the cursor indicated. For example, CASE_NO. may be added to letters in this way.
- If a field is entered in error, simply highlight it, hit Delete on keyboard and choose again.
- Click Save to save changes.
- To avoid creating errors on the templates, users should do a Save As for each template and make their changes on the Save As version, leaving the original template untouched. If fields have been lost or mistakes have been made with your original templates, contact EDI.

Note: For multi county groups - User can assign letter to a different county by using the Save As feature in Microsoft Word and then re-naming the letter with the different county name. For example, Introduction Letter-Lincoln County can be edited, re-named and saved as Introduction Letter-Lyon County. In this way, letters can be individualized for different counties within a group. The 3 digit county code may also be used for brevity. (The C3 data conversion automatically creates a letter template for each county.)

To add a custom letter:
- Click on Letters in main menu bar.
- Click on View/Edit Letter Entries…
- View/Edit Letter Template Entries window will appear.
- Click Add button.
- Edit Letter Template Entry window will appear.
• If letter will be for individual child, click on **PMI Required** button.
  - Designate county the letter will be assigned to. For single counties, C3 will default to that county. Multiple county groups can click on the drop down to select a county.
  - In **Description** bar, type in name of custom letter.
  - Click Select File.
    - A **Select a Template File** window will appear.

  ▪ Click on **EMPTY.doc** from list. **EMPTY.doc** will appear in file name.
  ▪ Place cursor in front of **EMPTY.doc** and type in custom letter name.
  ▪ Click **Open**.
  ▪ A **Select a Template File** will appear asking you **Create the file**, click **Yes**. An **Edit Letter Template Entry** window will appear with the **Template File**.
  ▪ The new custom letter file will appear at the bottom of the letter list on the window **View/Edit Letter Template Entries**.
  ▪ To create the body of the custom letter, highlight the letter and click **Open File**.
  ▪ The letter file should open immediately, if not, call CATCH
  ▪ Click “Save” to save the file
An “Edit Letter Template Entry” Window will appear In “File Name:” type in name of the custom letter after the “*.doc”. (This is the place where the cursor automatically goes.) **Do not type “.doc”.** This will automatically be added to the file name.

- Click “Open”.
- If the file does not exist, the user will be asked if they would like to create a new file. Click “Yes”. This will copy the contents of “EMPTY.DOC” to the new file name specified.
- “Edit Letter Template Entry” window appears with the new custom letter information.
- Click “Save”.
- New custom letter name will now appear on “View/Edit Letter Template Entries” window.
- Highlight new custom letter name.
- Click “Open File”.
- A blank letter with the essential fields will appear in Microsoft Word, so user can create the body of the new custom letter and add fields as needed. (User may have to scroll down to view letter template.) When letter is created, click “Save”.

**Copy to Other County:** This allows user to copy a letter template exactly as it is to another county. For multiple county groups:

- Highlight the letter entry to be copied.
- Click **Copy to Other County**.
- If more than 2 counties exist in the county group that do no not have the selected letter template set up to them, a window will pop up to display a list of those counties.
- Highlight to select county to be copied.
- A **Confirm** window will appear.
- Click **Yes** to copy to other county.
- Repeat process to copy to other counties.
- If there is only one county left not copied, no pop up list will appear. The **Confirm** window will appear and when user clicks **Yes**, C3 automatically copies to that remaining county.

**Standard Letters Notes:**

**Reminder letters:** There is a situation that DHS has become aware of where CATCH will not generate a reminder letter to a child. CATCH is programmed to calculate reminder letter generation based on the child’s birth date. Specifically, it calculates the screening due based on the birth date and generates the letter 2 weeks before the screening due date. The issue we have not been able to resolve is this: if the child’s birth date falls within the 2 week period immediately following the download, a letter is not generated because the birth date falls before the 2 week period has elapsed for the system to generate the letter. However, children who have moved from county#1 to county #2 should receive a reminder letter from county #1 because county #1 is the county of financial responsibility (CFR) for 2 months or 60 days after the child/family moves to county #2 and before county #2 takes over as CFR. So, county
#1’s CATCH system should have generated the reminder letter to the child. But, children new to CATCH, whose birth date falls within the 2 week period following the download, are the children who do not receive letters. We cannot attempt a fix until we move to a web based system. In the meantime, it is a good idea to check the “Download Results-Recipients That Are New” Report each month and check for new children’s birthdays. If for example, you download on June 15th, you would want to look for children whose birthdays fall between June 15th and June 29th and who are new to CATCH. There probably won’t be many, but as you find them, you could manually generate a reminder letter to the child. If this is not done, the child will get a letter generated 2 weeks before the next screening after this one is due.

- **Introduction letters:** Remember that the Introduction letter is generated to the case, not the child. Introduction and Re-notification letters always go to the case. Reminder and PAC letters go to the individual. Of the 4 standard system generated letters, the child (who is not also a parent) only receives reminder letters. That is all you will ever see on the child history. All other outreach contacts are by the case and can be viewed under case history.

- Also, the system only generates one Intro letter per case even if the case becomes inactive and then is reactivated. When reactivated, the system finds that the case received an Introduction Letter already so no new Intro is generated. Reminder Letters resume and are sent when due. So it can happen that a “new” child sometimes does not receive a Reminder Letter if the child is not due for a screening or the child’s family does not receive an Introduction Letter because the case already received one. However, if the child becomes active under a new case name or number, an Intro letter will be generated to the case because the system searches and identifies the new case status.
Reports (main menu bar):

Note: Descriptions of individual reports can be found in the section titled CATCH 3.1 Standard REPORTS descriptions on page 55.

General Information:
A list of available reports is found under Reports, Run Report in the C3 main menu bar. The user can click to select one of the listed reports that will in turn enable the Run Selected Report button. Clicking on the Run Selected Report button will bring up one or more associated windows that will display options for the selected report.

The Preview Report Before Printing option is checked by default and should be left that way. This designation shows on the bottom of the CATCH 3.1 Reports selection window. This allows user to view a report and check the report length before choosing to print. Some reports will be very long. User should always check the length of the report before choosing to print. Most reports are designed to be viewed rather than printed. (If for some reason, this box is not checked on your reports window, you can activate it by going to Utilities on the main menu bar, click on Configuration, click on Preview Reports Before Printing, then click on OK. User should go back to reports window to check if this is activated.)

Report years will only show in the year choices if there is data for that year. Future years do not show because they have no data.

Many reports have Select Options for users to tailor reports to their specific needs. These options allow the user to select from the following options: Minimum/Maximum Age (range), Phone Number, City, Zip Code, Select Languages, Select Nationalities and Select Races. If the user does not want to choose additional select options, leave choices blank and click Run or Run w/Save. The Run w/Save feature allows the user to save the report under Cases By Report (under Queries).

Many reports have a Sort Options feature and a Change Sort Order option which allows the report to be run in user-specified sort order. See CATCH Manual instructions on Page 39.

Most reports have the option to choose Include Extra White Space. This is for those who do their outreach from printed lists and need room for contact notes on the page. This data is then entered into CATCH at a later time.

- To open Reports, click on Reports in menu bar.
- Click on Run Report.
- CATCH 3.1 Reports window will appear.
• Click on selected report from C3 Reports list to choose. The Run Selected Report button will activate.
• Click on Run Selected Report.
• Click Run.
• User will have report selections to choose for each report. For example, the Outreach Activity Summary Report requires choice of Report Year, County and Worker.
• Choose from available report selections.
• Click Run.
• Some reports will show a Run w/Save option. This option allows user to save the report as a query. See Utilities (main menu bar), Run/Edit Queries, Run Queries window. This query will appear under Cases by Report in Available Queries list.
Always preview report before printing. Reports may vary greatly in length. Number of report pages will be displayed at top right of report page and at bottom left. User can choose to cancel a report during preparation while in preview mode, but not in print mode. Click Cancel, then Close.

Note: Preview Reports Before Printing box is already selected in the configuration window, which is found under Utilities. Do NOT change this or reports will automatically print. This box needs to remain checked at all times. (The information in this window should be maintained by technical staff and not be changed by anyone else.)

Print/Preview menu bar: User may click on Maximize button at top right hand corner of window to expand report for viewing.

- Print/Preview menu bar includes the following options:
  - **Print**: Click to print report.
  - **Whole Page**: defaults to 79%, **Page Width**: defaults to 93%, **100%**: defaults to 100%, **First Page, Prior Page, Current Page, Next Page, Last Page and Close**.
Create Custom Report:

- Click on Reports on menu bar.
- Click on Create Custom Report…. A Run Queries window will appear.

- Click on drop down arrow by Query Type to view available queries.
- Click on Query Type desired.
- Available Queries for that query type will be shown.
- Highlight selected query and Run Query button will be activated.
- Click on Run Query.
- A query options window will appear. Choose from query options, then click Run.
- Query Results will be displayed, noting the number of records in the query.
- User should always review query results. If unsatisfied with query results, user may continue to run queries until desired query is obtained.
- The Title for Report bar shown at right will default to the name of the query. User may enter a different name if desired.
- Select paper orientation. It defaults to Portrait. Click on Landscape if desired.
- The printed report will appear the same as it does on the query. (If desired, the user can rearrange the columns of the query before printing by clicking and holding on column heading and dragging it to desired location.)
- Click on Create Report button to preview report or to print.
- Click on print button on menu bar to print report.
Note: User can also access the Custom Letters and Assign Tasks tabs from the Run Queries window.

Delete Saved Report Data:
- To delete old reports from the Case Report Query
  - Click Report on menu bar.
  - Click on Delete Saved Report Data.
  - A Delete Saved Report Data window will appear.

- Highlight the report to be deleted.
- Click Delete button to delete the report.
- A Confirm Window will appear asking, “Are you sure you would like to delete the selected saved report data?” Click Yes.
- To highlight more than one report to be deleted, hold down Ctrl key and click on the desired reports. Then click the Delete button.
CATCH 3 Standard REPORTS

General Information:
A list of available reports is found under “Reports”, “Run Report” in the C3 main menu bar. The User can click to select one of the listed reports that will in turn enable the “Run Selected Report” button. Clicking on the “Run Selected Report” button will bring up one or more associated windows that will display options for the selected report.

The “Preview Report Before Printing” option is checked by default and should be left that way. This designation shows on the bottom of the “CATCH 3.1 Reports” selection window. This allows user to view a report and check the report length before choosing to print. Some reports will be very long. User should always check the length of the report before choosing to print. Most reports are designed to be viewed rather than printed. (If for some reason, this box is not checked on your reports window, you can activate it by going to “Utilities” on the main menu bar, click on “Configuration”, click on “Preview Reports Before Printing”, then click on “OK”. User should go back to reports window to check if this is activated.)

Report years will only show in the year choices if there is data for that year. Future years do not show because they have no data.

Many reports have select options for users to tailor reports to their specific needs. These options allow user to select from the following options: Minimum/Maximum Age (range), Phone Number, City, Zip Code., Select Languages, Select Nationalities and Select Races. If user does not want to choose additional select options, leave choices blank and click “Run”.

Many reports have a “Sort Options” feature and a “Change Sort Order” option which allows the report to be run in user-specified sort order. See CATCH Manual instructions on Page 35.

Most reports have the option to choose “Include Extra White Space”. This is for those who do their outreach from printed lists and need room for contact notes on the page. This data is then entered into CATCH at a later time.

The "Run w/Save" feature, allows the user to save the report under “Cases By Report” (under Queries”).

1. CASE REPORT: This report was designed as a means to print out all or selected case information in a report format. This report includes user selected individual case information and can be run from the case window or through Reports on the C3 main menu bar. If run through Reports, the user clicks on Select Case, runs a query to find the case, highlights the case and clicks Open which then puts it in the report Case field. Once case is selected, options include:
After selections have been made, click **Run** to generate the report.

2. **CHILD REPORT**: This report was designed as a means to print out all or selected child information in a report format. This report includes individual child information and is formatted the same as the **Case Report**. It can be run from either the child screen or **Reports**. Once child is selected, options include:

After selections have been made, click **Run** to generate the report.
3. **DOWNLOAD RESULTS**: This report was designed to show download information and results. **This report should be run after every download to check if the download was successful.** If a download was accomplished successfully, a Download ID will be shown. The user can select a download ID by highlighting it and then choose from 3 available report options for further download information. These options include:

![Download Results Report](image)

After selections are made, click **Run** or **Run w/Save**. A window with additional select options appears. These options include:

![Additional Select Options](image)

After selections have been made, click **Run** to generate the report. If no selections are required, click **Run**.
Examples of how this report may be used:
The user may want to target outreach to specific families by age groups, languages, or zip code. E.g. user may want to do special outreach to families with teens who were inactive and are now active. This report may also be used to assign Introduction calls to multiple workers through the **Batch Assign Task** screen

4. **FOSTER CARE CHILDREN:** This report is designed to list all the active children in the database who have** Foster Care Parent(s)** listed as the choice under** Case Contact Relation to Child** on the child screen. **It is important to note that this information is entered by local C&TC staff only.** Foster care information is not available from the download at this time. This report was developed to allow agencies some means of tracking the foster care children they become aware of in their database. Children go on and off foster care services. Because of this, the report will show information on not only individual active children who are both on foster care now but also those who were on foster care at some prior time. The children will not all be currently in foster care. If the user does not enter any foster care information in the **Case** or **Child** window, no children will appear on this report. When the **Eligible Foster Care Children Report** window appears, the user has the option to change sort options by clicking on **Change Sort Order** button. When sort options have been selected, click **OK**. The **Eligible Foster Care Children Report** window appears again. Click **Run** or **Run w/Save**.

A window with additional select options appears. These options include:
After selection(s) are made, click **Run** to generate the report. If no selections are required, click **Run** to generate the report.

5. **INVISIBLE CHILDREN**: This report is designed to give information on those children who are hard to reach and/or who have not had a screening. This report will help in identifying those children in need of special outreach. A child is considered to be “unreachable” if they have received no **direct** contact with a C&TC worker, e.g. telephone calls or face-to-face communication, within the given report period. A child is considered to "have not had a screening" if they have not had a screening with a service date that falls within the report period. A child is considered to be unreachable and have not had a screening if both of the above are true. The report options offer further breakdowns of invisible children. Options include:
When selections are made, click **Run** or **Run w/Save**. A window with additional select options appears:

- When sorting by Minimum and Maximum age selections, enter ages in months for any age under 3 years of age.
- Entering a two year Maximum age will produce a report that includes children up to age 2 years, 11 months.
- Users must be age and screening schedule specific when choosing report sorting options. After selection(s) are made, click **Run** to generate the report. If no selections are required, click **Run**. The report gives individual child and case information.
- **Examples of how this report may be used:** The user could target outreach to families with ‘invisible’ children who are in a specific age group, in a certain zip code, and/or by language. The user might focus on non-English speaking 3 year olds for early childhood screenings. The user could then send custom letters to these families. The custom letters can be created from the Run/Edit Queries screen.

6. **LETTER RESULTS:** This report is designed to capture the information from the **Contact Failure Reason** drop down box in the Enter Outreach Activity folder on the case screen. Available options include **Report Year** and **County**, if applicable. **The information for this report comes from user-entered data only.** The data is gathered as indicated on page 41 of the CATCH User Manual, **To track returned C3 letters**. The report data will show any of the choices that were entered by the user for the report year selected. **If no information is entered by local users, this report will be blank.**
After selections have been made, click **Run** to generate the report.

7. **LETTERS GENERATED**: This report allows the user to print a report of any chosen letter batch or portion of any letter batch with a variety of report choices and sort options. When this report is run, the user has a choice of all letter batches the system or the user has generated. Batches are listed in descending order with the most recent batch at the top of the list. Every letter batch has a **Batch ID** number so that those letters are accessible to the user for reprinting, etc. The **Prepared Date** is the date that the batch was created. **Note**: Because a standard batch date is set to midnight of the day that the batch was created, the date of the batch will appear as the day following the date that the letters were actually generated. Under the Std. column, if a **Y** is present, this indicates if the batch is composed of standard, system generated letters, e.g. introduction, reminder/child, reminder/parent and re-notification letters. If an **N** is present, this indicates the batch is not a standard batch but rather a custom batch generated by the user. Highlight letter batch in **Available Letter Batches** box. Letters will appear in **Letters Type** box. Report options include:

The report will print according to the sort order selected. After selections have been made, click **Run** or **Run w/Save**. A window with additional select options appears. These options include:
After selection(s) are made, click Run to generate the report. If no selections are required, click Run to generate the report.

8. NATIONALITIES/LANGUAGES/RACES: This report was designed to allow the user to choose a report of active cases based on Nationality Selected, Language Other Than English, or Race Selected. The user can select from an additional three choices for the report:

- Sorting by **Include All Active Cases** will generate a report of case information based on the Nationality Selected.
- Sorting by **Include Only Cases That Have Received Outreach** will generate a report of cases that have received a C&TC contact based on the Nationality Selected.
- Sorting by **Include Only Cases That Have Not Received Outreach** will generate a report of cases that have not received a C&TC contact based on Nationality Selected. (The definition of Outreach for the purposes of this report means any outreach activity other than a system generated standard letter, e.g. telephone calls, face-to-face contacts, custom letters.)
• A Nationalities/Languages/Race window with additional select options appears. These options include:

![Nationalities/Languages/Race window]

• If selection(s) are made, click Run to generate the report. If no selections are made, click Run to generate the report.

• **Example of targeted outreach:** User may want to identify families by language who have not received outreach with focus on a certain zip code. The user could then create outreach opportunities to connect with those families, e.g. telephone calls, custom letters.

9. **OASR COMPANION REPORTS:** This report is designed to further break down the OASR totals. It allows the user to look at all user-entered details, e.g. activity contact type, contact details for each of the 6 outreach activities listed in case screens. These are the 6 areas of outreach activity that users choose from when entering an outreach activity in CATCH. Options include: 1. **Report Year**-the user chooses from a list of years that outreach activity history information is available, 2. **Report Type**-the user can choose from the 6 areas of outreach activity which include: “Introduction Related,” “Reminder Related,” “Assistance-CTC Screening,” “Assistance – Referral Follow-up,” “Assistance – Dental,” and Assistance – Other. 3. **Worker**- the user can choose a report of all workers or a specific outreach worker, 4. **County**-choices will be available for multi-county groups where applicable. User-entered contact details that have data associated with a contact type will appear on the report, whether enabled or disabled (See OASR Line Definitions on page 64 for line details).
After selections have been made, click “Run” to generate the report.

10. OUTREACH ACTIVITY SUMMARY (OASR): This report is designed to give a summary of all CATCH entered outreach activities and is one of the reports submitted annually to DHS. It captures all outreach contacts and offers the following options: 1. Report Year: User chooses from a list of years that outreach activity history information is available, 2. County: if applicable, the user can choose from All Counties Separate, All Counties Combined or a specific county from the list of counties in the group and 3. Worker: The user can choose a report of all workers or a specific outreach worker.

After selections have been made, click Run to generate the report.

- **Line #1: Active Cases:** Cases active for the month/year listed. Not cumulative. Total is the unduplicated number of active cases for the year. These numbers include active cases, some of which became active in the month and others that became active earlier.
- **Line #2: Inactive Cases:** Cases that were not active for the month/year listed. Not cumulative. Total is the unduplicated number of active cases for the year.
• **Line #3: Active Children:** Children active for the month/year listed. Not cumulative. Total is the unduplicated number of active children for the year.

• **Line #4: Inactive Children:** Children that were not active for the month/year listed. Not cumulative. Total is the unduplicated number of inactive children for the year.

• **Line #5: Said Yes to C&TC:** These numbers represent all active cases in the database with the “Yes to C&TC” response as of the month indicated. The numbers are not cumulative. The total represents an unduplicated count.

• **Line #6: Said No to C&TC:** These numbers represent all active cases in the database with the “No to C&TC” response as of the month indicated. The numbers are not cumulative. The total represents an unduplicated count.

• **Line #7: Undecided about C&TC:** These numbers represent all active cases in the database with the “Undecided to C&TC” response as of the month indicated. The numbers are not cumulative. The total represents an unduplicated count.

• **Line #8: Screenings:** Number of screenings in the database that occurred in the month. Cumulative. The total represents the number of screenings for the year and is based on paid claims from DHS (Fee-For-Service or FFS) claims and health plan claims. Providers have up to 1 year to bill for C&TC services, so screenings are still downloaded for the past year up to one year past the date of service. On January 1, 2004, no additional screenings/referrals could be added for year 2002.

• **Line #9: Referrals:** Number of referrals in the database that occurred in the month. Cumulative. The total represents the number of referrals for the year. Since referral information is attached to claims, the above information in Line #8 also pertains here.

• **Line #10: Total Outreach activities:** Total of all outreach activities by month. Cumulative. The total represents the number of all outreach activities entered in CATCH for the year.

• **Line #11: Introduction Related:** All outreach activities where “Introduction Related” was selected by users from “Outreach Activity” drop down box in “Enter Outreach Activity” folder when entering an outreach activity. The activities occurred in the month and are cumulative for the year.

• **Line #12: Reminder Related:** All outreach activities where “Reminder Related” was selected by users from “Outreach Activity” drop down box in “Enter Outreach Activity” folder when entering an outreach activity. The activities occurred in the month and are cumulative for the year.

• **Line #13: Assistance – C&TC Screening:** All outreach activities where “Assistance – C&TC Screening” was selected by users from “Outreach Activity” drop down box in “Enter Outreach Activity” folder when entering an outreach activity. The activities occurred in the month and are cumulative for the year.

• **Line #14: Assistance Referral Follow-up:** All outreach activities where “Assistance Referral Follow-up” was selected by users from “Outreach Activity” drop down box in “Enter Outreach Activity” folder when entering an outreach activity. The activities occurred in the month and are cumulative for the year.

• **Line #15: Assistance – Dental:** All outreach activities where “Assistance – Dental” was selected by users from “Outreach Activity” drop down box in “Enter Outreach Activity” folder when entering an outreach activity. The activities occurred in the month and are cumulative for the year.

• **Line #16: Assistance – Other:** All outreach activities where “Assistance – Other” was selected by users from “Outreach Activity” drop down box in “Enter Outreach Activity”
folder when entering an outreach activity. The activities occurred in the month and are cumulative for the year.

- **Line #17: Total Phone Calls**: Total phone calls made by month and year. Cumulative.
- **Line #18: Total Letters**: These numbers include all standard letters, (Introduction, Reminder/Child, Reminder/Parent a Child (PAC) and Re-Notification) whether system or user-generated and all custom letters generated by users. Cumulative.
- **Line # 20: Introduction**: Total Introduction letters by month and year. Cumulative.
- **Line #21: Reminder/Child**: Total Reminder/Child letters by month and year. Cumulative.
- **Line #22: Reminder/PAC**: Total Reminder/PAC letters by month and year. Cumulative.
- **Line # 23: Re-Notification**: Total Re-Notification/PAC letters by month and year. Cumulative.
- **Line #24: Custom Letters**: Total custom letters (user-generated) by month and year. Cumulative.
- **Line: #25: Face-to-Face Contacts**: Counts all face-to-face contacts that were selected from the “Contact Type” drop down selection in the “Enter Outreach Activity” folder. Some additional contact types may be added by users for specific tracking needs (see page 60 of the CATCH User Manual). This data will be included in the Face-to-Face Contact totals.

**Contact Detail Totals**: The following report line items (26 through 39) are details from the detail selection list in the “Enter Outreach Activity” folder. Additional details may be added by users for specific and frequent tracking needs. They will always appear on the OASR whether there is data attached or not. The numbers in each detail line are cumulative. These numbers indicate the number of times the detail was selected by the user for the month/year. Each detail has a bubble which describes the detail that pops up if you click to highlight the detail and hold the cursor over the detail. The number of report lines will increase as details are added by user.

- **Line #26: Information/C&TC**: This detail should be checked if general C&TC Program information was given to the client.
- **Line #27: Assistance/C&TC Screening**: Indicates any assistance given related to helping a C&TC client access C&TC screening services, e.g. information given about providers, making a C&TC appointment for a client, etc.
- **Line #28: Assistance/C&TC Referral Follow-up**: Indicates any assistance given related to helping a C&TC client access C&TC referral follow-up services, e.g. giving referral resource information, making the appointment, etc.
- **Line #29: Assistance Dental Checkup**: Indicates any assistance given related to helping a C&TC client access dental checkup services, e.g. giving information about dental providers, making the appointment, etc.
- **Line #30: Assistance/Transportation**: Indicates any assistance given related to helping a C&TC client access transportation services for C&TC screening or referral follow-up appointments, e.g. giving information about transportation choice, making the arrangements, etc.
- **Line #31: Assistance/Interpreter Service**: Indicates any assistance given related to helping a C&TC client access interpreter services for C&TC screening or referral follow-up
appointments, e.g. giving information about interpreter resources, making the arrangements, etc.

- **Line #32: C&TC Client Said Yes to C&TC**: C&TC client has indicated that they want to participate in C&TC/receive C&TC screening benefits. This detail is one of 3 participation choices that can be made on an outreach activity contact. This is user-entered only and indicates that the user has directly communicated with the family either by telephone or face-to-face contact and has determined from the conversation that this family intends to participate and take advantage of C&TC benefits. This response is tracked from the *Wants C&TC* box on the case window. **Do not use this detail or any detail by assumption. If the client/family has not called or written to say they do not want to participate, do not assume that they do want to participate. Leave the family as “Undecided” in this case.**

- **Line #33: C&TC Client Said No to C&TC**: C&TC client has indicated that they do not want to participate in C&TC. This detail is one of 3 participation choices that can be made on an outreach activity contact. This is user-entered only and indicates that the user has directly communicated with the family either by telephone or face-to-face contact and has determined from the conversation that this family does not intend to participate and take advantage of C&TC benefits. This response is tracked from the *Wants C&TC* box on the case window. **Try to avoid “No” responses as much as possible as this causes all letters/outreach to the family to stop for one year.**

- **Line #34: C&TC Client is Undecided**: Even after outreach, C&TC client remains undecided about participation in C&TC. This detail is one of 3 participation choices that can be made on an outreach activity contact. This is user-entered only and indicates that the user has directly communicated with the family either by telephone or face-to-face contact and has determined from the conversation that this family remains undecided about C&TC participation. This response is tracked from the *Wants C&TC* box on the case window. **Undecided responses still allow outreach/letters to continue.** Note: The case defaults to *Undecided* until user enters the client-driven choice.

- **Line #35: Referral to WIC**: Use this detail if the client/family was referred to WIC.

- **Line #36: Information/Community Resources/Programs**: Other information given to client/family on child health issues, child/family resources, requested information, community resources, other available programs the client family might need to know about, etc.

- **Line 37: Sent Additional Information**: Information sent which is in addition to the standard C&TC mailings such as child care resources, Head Start Program information, etc.

- **Line #38: Other Assistance**: Any other type of client assistance given, such as client requests referral to another agency service, etc.

- **Line #39: C&TC Referral Follow-up Accomplished**: User has information from the client that the C&TC referral follow-up visit has occurred. At least one referral reported from the C&TC screening has been accomplished. Selecting this detail opens a dialog window allowing user to select the child and screening for which the referral was accomplished. See manual for instructions.

- **Additional Lines: User-entered Contact Details.** All Contact Details added by user will appear on the OASR, whether they have data attached or not or whether they are enabled or disabled. Only Contact Details that have data attached to the Contact Type selected will appear on the OASR Companion Reports, whether they are enabled or disabled.
11. **OUTREACH ACTIVITY/SCREENINGS:** This report allows the user to check on the number of screenings performed after identified outreach is completed. The report gives users an indication if the number of screenings is increasing after their outreach efforts. The report shows Activities (number of cases that received outreach), Activities with Screening (number of cases that received at least 1 screening after the outreach activity), Activity Success Rate (percent of cases that received at least 1 screening after the outreach activity), and Total Screenings Generated (total number of screenings performed after the outreach activity).

The Total Screenings Generated includes all screenings that occurred within the selected timeframe after the activity date. For example, if a child has a 1 month and 2 month screening within 3 months after the activity date, both screenings will be included in the total. The user can choose which activity, contact type and detail for a selected period of time and check the number of screenings done within a given period. This report is useful in tracking general outreach efforts or for specific/pilot outreach efforts. Report options include:

![Outreach/Screening](image)

After selections have been made, click **Run**. A window with additional select options appears. These options include:
After selection(s) are made, click **Run** to generate the report. If no selections are made, click **Run** to generate the report.

**Examples of specific outreach efforts:**

1. If the user planned to do ongoing special telephone outreach to a group of invisible children and wanted to report how many screenings occurred for tracking purposes, the user must create a special "Contact Type" (i.e. Invisible child outreach). See page 93 for instructions on how to create a special “Contact Type.” User can then check the results 3 or more months after the phone calls were made. If the outreach is ongoing month to month, user may want to do monthly checks. For phone calls made in March, user may want to run a report in July for Reminder Related (Outreach Activity), Invisible child outreach (Contact type), and any or no contact details (Contact detail) for the month of March (Activity Date Occurred Between: 03/01/04 and 03/31/04). This report is based on a combination of 'Outreach Activities' and 'Contact Types'.
2. If the user planned to do ongoing face-to-face outreach to teen parents in schools, a special Face-to-Face “Contact Type” would be created (i.e. Face-to-Face/Teen Parent Outreach) under Utilities. The user could then check later to see how many children received screening.

*Note: It is important to keep in mind that the results of this report are based on consistency in the way the data is entered. The user will want to decide in advance...
which Outreach Activity (Introduction related or Reminder related), “Contact Type” and “Contact Detail” will be used.

Many things affect why parents bring children in for screening, so this is only one indicator of the success of specific outreach. This report offers users an indication if the number of screenings is increasing after their outreach efforts.

12. REFERRALS: This report gives information about referrals reported from screenings. Report information comes from CATCH downloads and should be run monthly to assist in determining which referrals need follow-up. Options include:

1. **Referrals from Last Download:** includes any screening marked as having a referral that was received in the last download.

2. **Referrals Downloaded Between Dates:** all referrals (completed and not completed) that were downloaded between the selected dates will be shown in the report.

3. **Referrals With Service Date Between Dates:** all the referrals (completed and not completed) that are in C3 with a service date between the selected dates will be shown in the report.

4. **County**, if applicable.

Once caught up with referral follow-up, users can just run the **Referrals From Last Download** report for follow-up on new referrals from month to month.

If the user changes Sort Options, click **OK** and **Referral Report** screen will appear again. After selections have been made, click **Run** or **Run w/Save**. A window with additional select options appears. These options include:
After selection(s) have been made, click Run to generate the report. If no selections are required, click Run to generate the report.

13. **REFERRALS NOT COMPLETED**: This report is designed to show those screenings marked as having a referral that do not have the Date Completed filled in on the child screen. The Date Completed is supposed to be filled in when the referral follow-up is complete. (Refer to pages 30-31 of the CATCH User Manual on how to mark a referral as being completed.) If the service date of the screening with the incomplete referral occurred within the user-chosen time period, it will be included on the report. Options include:

- **Referrals Not Completed by Month** - offers choice of month and year for all screenings with referrals that have no Referral Completed date.
- **Referrals Not Completed for the Time Period** – offers date choice for all screenings with referrals that have no Referral Completed date.
- **County**, if applicable.
If the user changes Sort Options, click **OK** and **Referrals Not Completed Report** screen will appear again. After selections have been made, click **Run** or **Run w/Save**. A window with additional select options appears. These options include:

![Referrals not Completed](https://example.com/referrals.png)

After selection(s) have been made, click **Run** to generate the report. If no selections are required, click **Run** to generate the report.

14. **SCREENINGS BY PROVIDER/CLINIC**: This report offers options of looking at numbers of screenings, referrals and incomplete screenings. It also gives a percentage of referrals per screenings by the provider or clinic. This report can be used as an indicator to help the user check on provider participation in C&TC. Options Include:

- **Report Year**
- **Screenings by Provider Number**
- **Screenings Grouped by Provider Number Ordered by Name**
- **Screenings by Provider Name**
- **Screenings by Clinic**
- **County**, if applicable
After selections have been made, click Run to generate the report.

Screening information is provided by the health plans on their providers’ claims data or the State’s claims data in the case of fee-for-service screenings. Each screening record has a referral indicator that can be set to ‘Y’, ‘N’, or ‘I’. A ‘Y’ indicates that there was a referral given during the screening. An ‘N’ indicates that there was no referral given. An ‘I’ indicates that the screening was incomplete. For purposes of this report, an incomplete screening is a preventive visit which was not billed as a complete C&TC by the provider. This means that no C&TC referral code was attached to the claim identifying it as a C&TC claim. The purpose in including this information with the download is to help the user determine which children have been in for some kind of preventive health care from those who have not received any preventive health care. It is also meant to help the user identify providers who may need training with C&TC Program requirements, components, billing, etc.

15. SCREENINGS NOT DONE: This report is designed to show all of the screenings that were due, for either the selected month or selected time period, that have no C3 screening records in the allowable time period for the due screening. It gives the user two main options:

- **Screenings Not Done:**
  This report lists all children who were due for a screening in the selected range but have no screening records in the allowable time period for the due screening. A screening period starts at the date that is the midpoint between the previous screening period’s due date and the current screening period’s due date. The screening period ends at the date that is the midpoint between the current screening period’s due date and the next screening period’s due date. E.g. if no screening occurs while the child is between 2.5 years old and 3.5 years old, it will count as the 3 year screening being “not done.” If a screening does not occur before a child is 6 weeks old, it will count as a 1 month screening being “not done.”

- **Screenings Overdue by:**
  Allows the user to look at screenings that were overdue for either the month/year or selected time period. Instead of using the screening period end date that is calculated within C3, the user is allowed to set the end of the period by choosing a specific number of months that will be added to the screening due date to determine the end of the period. If
that overdue period end date falls within the user-chosen time period, the child will be included in the report as having an overdue screening. E.g. if in July 2004, the user wanted to know how many children were 4 months overdue in getting a C&TC for the past 6 months, the Screenings Overdue by Month option should be chosen and the 4 month option selected. Then the time frame should be chosen through the **For Time Period** (January 1, 2004 to July 1, 2004). All children whose birthday falls between September 1 and March 1 who do not show a screening in C3, will appear on the report as 4 months overdue for a screening.

**Note:** Screening information is based on paid claims and the provider has up to one year from the date of service in which to bill. This will impact the screening information available. Options include:

If the user changes Sort Options, click **OK** and **Screenings Not Done Report** screen will appear again. After selections have been made, click **Run** or **Run w/Save**. A window with additional select options appears. These options include:
After selection(s) have been made, click **Run** to generate the report. If no selections are required, click **Run** to generate the report.

16. **UNDECIDED ABOUT C&TC:** This report is designed to identify and list all active cases that are undecided about C&TC.

Make selection and click **Run** or **Run w/Save**. A window with additional select options appears. These options include:
After selection(s) have been made, click **Run** to generate the report. If no selections are required, click **Run** to generate the report.

**Example of how this report may be used:** The user could target telephone outreach to all undecided families or select specific languages, age groups, or zip codes.

17. **WANTS C&TC STATUS:** This report is designed to show "Yes", "No," and "Undecided" responses to C&TC participation. Options include:

- **Report Year.**
- **Report On Cases That Indicated Their Participation Within The Month** – this counts the user-entered responses from clients that were entered for the month. This count does not include the download Undecideds.
- **Report On the Participation Status Of Cases As Of The Month** - this counts the current status of all cases as of that month.
- **County**, if applicable.
This information is case specific, not child specific. When C&TC outreach staff have direct contact with the client to do outreach and can determine if the client wants or does not want to take advantage of the C&TC benefits for their children, or in some cases, themselves, then this information is entered by the user on the case screen. The Undecided response should not be changed by the user unless and until they have a Yes or No response as a result of direct contact with the client, e.g. telephone call or face-to-face contact.

It is important to keep in mind, that while it may seem logical, numbers in one report will not necessarily match those in another report. This is due to the nature of the queries for each report.

Examples:

- The Undecided about C&TC report cannot be compared to the OASR. The numbers will not match because of the way the data is being looked at. The Undecided about C&TC report lists cases that are currently active and undecided. The OASR counts cases that were active and undecided at anytime within the month.

- The OASR Companion report cannot be compared to the Outreach Activity/Screening report. The numbers will not match because the reports have different queries. The OASR Companion report only looks at outreach activities. The Outreach Activity/Screening report is a much more complex joining of data which can limit the data.

Report notes:
The numbers will fluctuate in rows #1-7 of the OASR. The reason for this is when a child is de-activated and then is re-activated, the active_begin_date is re-set to the day the child is re-activated. That moves their activity period so that the child no longer shows as active in the past. (The system may be changed at some future date.)
Tasks (main menu bar):

View tasks:
- Click on **Tasks** in the menu bar.
- Click on **View Tasks** in drop down menu.

When **View Tasks** is opened, the **Incompleted Tasks** list appears for the currently logged-in user, if any tasks exist for that user. To view another user’s tasks, click on **Worker** arrow and select name from drop down menu.

- Click on **View** arrow for drop down menu and click on desired task group (Incompleted Tasks, Completed Tasks, Due/Overdue Tasks or All Tasks).

- The columns of task information available are pictured in the window above. The **Entered** and **Tickler** columns show tasks by most recent date entered.

- To work from the task list, highlight task to be completed. User can now view case or child associated with the task by clicking on activated case or child arrow button above task list. (PMI # and/or Case # have to be listed for task entry for child and/or case button to be activated.)

- At case window, click on **Enter Outreach Activity** folder. A red check mark (✓) box will appear next to **History**. If user holds cursor over check mark, a description of the task will pop up. This check mark is not visible if task has been documented as completed. This check mark will only be visible on **Enter Outreach Activity** folder on the case if user goes through **Tasks** to open the case. (If the child window is opened, the **Edit Outreach Activity** folder will also show the red task arrow.) This feature is designed for users working on their
incomplete task list. It is a convenient way for user to view task description without going back to the task list.

- At the case or child window, user can complete task.
- When task is completed, provide activity documentation using the case/child Enter/Edit Outreach Activity folder.
- On saving the outreach activity, a CATCH 3.1 window will appear as seen below.
- Click OK.

The Create/Edit Task window will appear. Enter completed task information:
For completed tasks, click on **Completed** task box.

- **Completed Date** defaults to today’s date for convenience. If date of completion is other than today, click on down arrow by date and click on correct completion date.
- Add any notes, if needed, about the task in **Completion Notes** box.
- Click on **Save**. This task will now be removed from the **Uncompleted Task** list and appear in the **Completed Task** view. It will also appear on the **All Tasks** list. (Also, on the **Enter Outreach Activity** folder, the red arrow indicating a task on case/child screen will no longer appear.)
- Close case or child window.
- User will be returned to **View Tasks for**… window to choose another task for completion.

- At the **View Tasks for**….. window, the user can also click on +**Add** button to add a new task entry for a specific worker.

The **Create/Edit Task** window will appear.

- To select case or PMI # that task concerns, click **Select Case** or **Select Child** button.
- **Select Case** will bring up **Open Cases from filter** window, defaulting to the **Active Case** filter. Use this filter (or another as appropriate) to select a case.
- **Select Child** will bring up **Active Children by Age Group** window. User may select filter choices and Click **Run** to bring up the query list of children to choose from.

- Select case or child from available filters. Either highlight case or child and click **Open**, or double click on highlighted case or child to move case or child selection to **Create/Edit Task** window.
- At **Create/Edit Task** window, **Assign To Worker** box defaults to current user. If task is to be assigned to another worker, use drop down arrow selection to choose appropriate worker.
- For date, CATCH defaults to **None**. The **None** box will be checked which means the task has no due date and can be done anytime.
- If a date is needed to remind worker of the task, click on **None** box to remove arrow. This will activate **Ticker Date** box which defaults to current date. If a different date is desired as the tickler date, click on drop down arrow and a calendar window will appear. Click on date desired. Right and left arrows at top of box allow user to choose another month as needed.
- Fill in **Task Description** box, describing task to be completed.
- Click on **Save**.
- New task will be added to **Incompleted Task** list for chosen worker.

- To delete a task from task list, highlight the entry to be deleted and click on the **Delete** button at top right of window. A **Confirm Box** will appear asking user to confirm delete choice. Click **Yes** or **No** as appropriate.
- Clicking **Yes** will delete task from task list.

**Batch Assign Tasks to single and multiple workers:**

- Click on **Tasks** on the menu bar.
• Click on **Batch Assigned Tasks**.
• The **Run Queries** window will appear.
• Choose **Query Type** from drop down menu. Available query list for this query type will appear.
• Highlight chosen query from query list, then click **Run Query**. (Arrows or bar to the right of query list can be used to move query order up or down.)
• Follow prompts to fill in options for query information as windows. (See Utilities section for more information on queries) Click **Run. Query Results** will display on lower half of window and number of records in query will be shown.
• **Important**: Check query results, e.g. check number of records, case versus PMI numbers, etc. to make sure data looks correct before assigning tasks.

**Batch Assign Tasks to a single worker:**
• On right side of window, **Worker** box defaults to current user.
  ▪ If the task is to be assigned to another worker, click on down arrow for list of workers.
  ▪ Click on name to highlight/choose another worker for tasks.

• If no tickler date is required for this task, leave the **None** box checked.
• If a tickler (reminder) date is desired, click the **None** box to remove the arrow and activate the **Tickler Date** box.
• The **Tickler Date** box defaults to the current date. To choose another date:
  ▪ Click on down arrow to view calendar.
  ▪ Click on date desired. Move arrows to choose another month and day.

• Fill in description of task to be completed in blank **Description** box.
• With assign batch task function, the entire query is assigned. If query is correct for the desired task, click on **Assign Tasks** button to create batch tasks. These tasks will be moved to chosen worker’s **Incompleted Task** list. To view assigned tasks, go to **Tasks, View Tasks**, and view **Incompleted Tasks by Worker**.

**Assign Tasks to Multiple Workers:**
• Run query as directed in preceding section.
• If no tickler date is required for this task, leave the **None** box checked.
• If a tickler date is desired, click the **None** box to remove the arrow and activate the **Tickler Date** box.
• **Tickler Date** defaults to current date. To choose another date:
  ▪ Click on down arrow to view calendar.
  ▪ Click on date desired. Use side arrows to choose another month and day.

On right side of window, click on **Assign to Multiple Workers** button. **Assign Tasks to Multiple Workers** window will appear.

• Fill in description of task to be completed in blank **Description** box.
• Click to highlight case to be assigned to individual worker. To highlight more than one case for a worker, hold down the **Ctrl** key and click on the desired cases.
• When the correct cases have been selected, highlight to choose worker for these tasks.
Click left arrows button. This action will move worker’s name to the **Worker** column left of the highlighted cases.

Before continuing to assign additional workers, move cursor to portion of query with no worker name assigned and click to remove the selected markers to left of assigned workers name.

**Important:** If this is not done, the next worker assigned will also pick up the previously assigned workers tasks because the selected markers have not been removed from the previous worker.

To continue assigning tasks, highlight a case then press and hold **Ctrl** key while highlighting additional cases. Choose next worker and use left arrows to assign tasks as described above.

When all tasks have been assigned, click on **Assign Tasks** button (top left) to batch assign tasks to these chosen workers.

This action will move these tasks to the appropriate workers’ **Incompleted Task** list.

Close out of the **Run Queries** window.

To view tasks, go to **Tasks, View Tasks** and view tasks by **Worker**.

**Other ways to assign tasks:**

- User can assign a task for either a case or child when entering an outreach activity for the case while at either the case or child window using either the **Enter Outreach Activity** folder on the case window or the **Edit Outreach Activity** on the child window. **(Note:** These folders provide the same function of documenting a case activity even though the names are slightly different) Tasks for a specific child will require a PMI # and can be added while at the child window.

  **To create a task for the case,** click on the **Enter Outreach Activity** folder on case window.

  Add information for the outreach entry as usual and before saving the activity, click on **Create Task on Save** box (next to **Contact By**) on the **General** tab or first outreach activity folder.

  Click **Save**.

  **To create a task for a child,** click on the **Edit Outreach Activity** folder on the specific child window.

  Add information for the case outreach entry as usual and before saving the activity click on **Create Task on Save** box (next to **Contact By**) on the **General** tab or first outreach activity folder.

  Be sure to also click on **Include PMI with Task** box below **Create Task on Save** box.

  Click **Save**.
• When you save the outreach activity, whether you have chosen to create a task for the case or the child, a C3 window will appear as shown below. Click OK.

• The Create/Edit Task window will appear.
• User can assign task to worker as previously described by using drop down worker list and clicking on specific worker.
• Assign date by clicking on None to activate Tickler Date. Click on arrow and click on date task needs to be done if current month. Use arrows to choose different month and day.
• Add task description in Task Description box and click Save to move task to the worker’s Incompleted Task list.

Note: By holding the cursor over red check mark next to History button on Enter/Edit Outreach Activity folder on case/child screen, a prompt will appear describing the task. This only appears if user has opened case or child window through Tasks on menu bar.

The Assign Tasks folder can also be found in the following ways:

Click on Letters in the menu bar.
• Click on Batch Print Letters.
• Click on Create Custom Letter Batch.
• The Run Query window will appear. Click on the Assign Tasks folder.

• Click on Reports in the menu bar.
• Click on Create Custom Reports.
• The Run Query folder will appear. Click on the Assign Tasks folder.

• Click on Utilities in the menu bar.
• Click on Run/Edit Queries.
• The Run Query window will appear. Click on Assign Tasks folder.
User (main menu bar):

- Click on user in menu bar to change users if C3 is already open.
- Click on Login… in drop down.
- Login box appears allowing new user to log on by entering new User ID name and password. After login is complete, new user name will appear at top of window. All future contacts will now be credited to the new Current user.

To Change Password:

- Click on Change Password from drop down menu under user on main menu bar.
- A Change Password window will appear.
• Type in new password in New Password field.
• Re-type new password in Confirm Password field.
• Click OK.
• A Password Successfully Changed window will appear. Click OK.
• If passwords are incorrectly entered, an Error window will appear with the message: 
  Passwords were not correct. Password was not changed. Click OK and try again.

To view currently Logged-In users:
• Click on User.
• Click on View Currently Logged In Users.
• The Logged In Users window will appear.

Important: It is helpful to view this window before attempting to download or do a program 
update from DHS. All users must be logged off C3 before download or update is done.

To edit existing user information:
• Click on User in menu bar.
• Click on Edit Users… in drop down menu.
• A C3 Users Window will appear, displaying a list of users alphabetically.
- Double click on user name to be edited. An **Edit User** window will appear.

- From this window you can change User ID name, password, first and last name, give a user administrator rights (to do downloads, do system backups, change user information) change the user title, phone number date employed or terminated. When changes have been made, click **Save**.
To add a new user:

- A user with **Administrator** rights must do this. Click on **Add** button.
- The **Edit User** window will appear.
- Fill in all available boxes with new user information:
  - **User ID:** Is usually the first initial and the last name of the user.
  - **Password:** Create a starter password so the new user can login to CATCH and change the password to one of their own.
  - **First Name and Last Name**
  - **Title:** This is the staff person’s C&TC working title, for example, C&TC clerk, C&TC Outreach Worker, Outreach PHN, C&TC Coordinator, etc.
  - **Administrator:** The **Administrator** designation is determined at the county level. This status should most likely be given to a supervisory person or lead C&TC worker and C&TC Coordinator. All C&TC Coordinators should have “Administrator” rights. **Only users with “Administrator” status can change (add/edit) users, do downloads, do system backups or add/edit queries.** At least 2 people at every C&TC agency should have “Administrator” rights so if one user is on an extended absence from employment another is available to make changes. Just click the **“Administrator” box to make a user an “Administrator”.**
  - **Phone (and Extension, if it applies)**
  - **Date Employed:** This field should always be filled in for current users. Click on down arrow and **click on appropriate date.**
  - When all information has been entered, click **Save.** This worker will now have access to CATCH.

- To terminate a current user:
  - **None box:** This defaults to checked status until Administrator needs to set **Date Terminated** when employee leaves. An Administrator enters the date terminated by clicking on the **None** box. The arrow will disappear and the **Date Terminated** field will be activated. The date defaults to today’s date. **Click on the correct date and then Save.** This worker will no longer have access to CATCH.
Utilities:

Downloads:

Important Notes:

- Do not download until the “Download is ready” email is received or user could corrupt the database. The memo is typically sent around the 15th of the month. Downloads should be done within a day or two of receiving the memo or at least within one week.
- Downloads need to be done in a timely manner so database information can be updated and reminder letters sent out in a timely fashion.
- For agencies printing letters everyday, CATCH will generate Reminder letters 2 weeks ahead of the screening due date. The system is programmed to base this on the child’s birth date and when the next screening is due.
- Updated information and timely letter generation are important reasons why every agency should have more than one CATCH system administrator.
- If for some reason you have to download after one week past receiving the memo, please contact staff at the CATCH support number to make sure the correct download is available. (651-431-3304 or via e-mail at dhs.catchsupport@state.mn.us)
- Typically downloads may be done safely until the end of the month, however, it is best to check with catch support staff. As of the 1st of each month, the new download is being prepared and tested. If downloads are attempted between the 1st of the month and the 15th (or before the download email is received), it is possible that a corrupt download will be downloaded which will corrupt the user’s database. **This is not a fixable problem unless user has a very recent database copy.**

To run download:

- Verify that all users are logged off CATCH except for the administrator doing the download.
- Click on Utilities in main menu bar.
- Click on Download Data… from drop down menu. The **CATCH 3.1 Downloader** window will appear.
• Click on **Download** button to start download process.
• **Download Log** box will show download progress information.
• Even if the system does not appear to be doing anything, it is very important not to close out of the window until CATCH specifically tells the user to close the window. If the window is closed prematurely, the download will be corrupted. **A corrupted download is not fixable.**
• A **Merge New Data** window appears with a progress bar and showing numbers **Added, Updated, Unchanged, De-Activated and Re-Activated.**
• A **C3 has been updated** window appears telling user download was successful and user can close window. User can click **OK.**
• **If this window does not appear, call CATCH support immediately.**
• It is not necessary to save the download log. However, **it is necessary** to check further to see if the download data is reasonable compared to past downloads.

**Check if download is successful:**

**Check by report:**
• When download is complete, run and view **“Download Results” Report.**
• Go to **“Reports”, “Run Reports”** in the main menu bar, select **“Download Results Report”**, click **“Run Report”.**
• This report creates a list of downloads as they are done. Each download will have an ID number and date. If the date of the download is there, the download was successful.
• If the download date is not there and the download was **not** successful, contact EDI staff immediately for step by step instructions at: **651-431-3304** or via e-mail at: dhs.catchsupport@state.mn.us
• The **Download Results** report shows numbers of new children added by the download. This number should fall into an acceptable range for past downloads received.

**Check by Letter Batch:**
• Following download, after first Letter Batch is created, check to see if letter counts (Introduction, Reminder, Parent-a-Child and Re-Notification letters) are in a range similar to prior post download letter batches.
• Introduction letters, which are only generated in the letter batch which follows the download, will generally be fewer in number than the number of new children because the introduction letter goes to the family, which usually has more than one child.

**Important Note:** User may print standard letters on the same day that the download occurs, but the user **MUST** create the standard letter batch **AFTER** the download occurs. Only one standard letter batch can be created per day. If the standard letter batch is created before the download occurs, the download and the download letter batch will not be able to be run until the next day. If user creates a standard letter batch and then tries to download, the following error message will appear. Click **OK.**
To Run/Edit Queries:

- Click on **Utilities** in main menu bar.
- Click on **Run/Edit Queries**. The **Run Queries** window appears which allows user to run any standard available queries.
- **Custom letters, Custom Reports** and **Assign Tasks** folders are available on the upper right hand side of the window. See instructions on how to run queries under **Letters, Reports** and **Tasks** sections.
- When entering desired data information in available query fields, user can use an asterisk (*) to help search the database. For example, when an asterisk is used after a single letter, all data beginning with that letter will be brought up. For example, when name searching, typing in “S*” will bring up all names from the chosen query beginning with an “S”. If user types in part of a name with an asterisk (JOHN*), C3 will bring up all names that have those letters, e.g. Johnson, Johnsen, Johns, etc. This also applies to numbers. When searching for a zip code, for example, typing in a couple of numbers and an asterisk (55*) will bring up all zip codes beginning with “55”.
- **Edit Query** button allows staff **with an expert knowledge of ACCESS** to edit basic query language to create new queries from existing query language. See following query note.
- **Add Query** button allows staff **with an expert knowledge of ACCESS** to add any query language in a blank query text to create new queries. It is important to make a copy of the database first. See following query notes.

**IMPORTANT QUERY NOTES:**

- If a county is interested in creating or editing queries, before doing any query writing, please contact DHS staff at the EDI e-mail address: dhs.catchsupport@state.mn.us. DHS staff may be able to write the query and include it in a download as an upgrade to C3 for all statewide users.
- If planning to create a query, it is very important to have a strong Access background and **make a copy of the database first as a backup**, since creating queries in ACCESS has the capability of creating problems with the database. If a user loses part or all of the database, DHS has no way of getting it back. Lost data is a serious contract issue, so please exercise every precaution.

To run a query from the “Run Query” window:

- User can choose the type of queries from the **Query Type** dropdown. This field defaults to **Show All** queries.
• **Available Queries:** Query type selected will show appropriate list of queries in the **Available Queries** window.

• To choose a query, click on query to highlight it, then click on **Run Query** button to run query.

• Query results will be shown in **Query Results** window. The number of query records is displayed to the right of **Query Results**.

• **Note:** It is important to check the number of query results before deciding to create a letter batch to the query, or print a query report, or to assign tasks to the query. If the number is very large, you may want to further define your query to reduce it to a more manageable size.

• **Query informational boxes:** Many of the available queries may ask user to edit or make informational choices for the selected query. Most query choices should be self explanatory.
  - Example: If user chooses the query, **Active Cases by City/Zip/Name**, a small window appears asking user to indicate what information is wanted in the query (Zip Code, City, Last Name, First Name, Middle Initial). User can choose to request one or more pieces of information available in specific query box, e.g. city and/or zip code, before clicking **Run**. If user clicks the **Run** button without entering any information, the query will result in showing all active cases because user did not enter any defining information.
  - Example: If user chooses the query, **Cases by Report**, a **Cases by Report** window appears with a drop down list of saved reports. Click on the report desired to select it. Click **Run**. To save a report to this list, user must be in a standard report (under **Reports** in the menu bar). Click on **Run w/Save** (rather than **Run**) button when ready to run the standard report. This function is available so user can re-run a standard report later as a query for purposes of sending letters or creating tasks to this report query. **Note:** Not all standard reports have the **Run w/Save** function.
  - CATCH will show active cases or children unless query states “all” or “inactive.”

• After query results appear, if you want to re-run the query with different information, click **Run Query** to bring up a blank information window to begin over.

• **Export button:** To export your results, just click the export button. The file name will come up as **Datafile.tab**. Change the file name to whatever you want_______ .XLS, i.e. newcases.xls, and place the File where you want.
To View/Edit Contact Type Codes:
- Click on **Utilities**.
- Click on **View/Edit Contact Type Codes**.... A **View/Edit Contact Type Codes** window appears.

- Use arrows to scroll to view existing contact type codes.
- **To add a contact type code**, click on **+Add** button. An Edit **Contact Type Code** window will appear.
Fill in the Description with name of new contact code. Create a Help window description of the code that will appear when cursor is held over highlighted code on case or child window.

If the contact type is face-to-face, click the New Code is Face-to-face Contact box.

When new contact type information has been added and is correct, click Save to add contact type to case window contact type list. C3 will assign a number automatically to the new contact type code.

Enable/Disable Contact Type Codes:
- Go to Utilities, then View/Edit Contact Type Codes.
- In the Standard column, the possible designations are Y, N, U and D:
  - Y = system generated
  - N = system generated
  - U = user entered, enabled status
  - D = user entered, disabled status
- Once added, contact type codes can be disabled and enabled, but not deleted. User can only disable and enable contact types that have a Standard designation of U and D.
- To disable a contact type with a Standard of U, highlight the contact type and click the Disable button. The Standard will be set to D.
- To enable a contact type with a Standard of D, highlight the contact type and click the Enable button. The Standard will be set to U.
- To edit a Contact Type code, double click on the contact type. When Contact Type information has been edited, click “Save”.

View/Edit Contact Detail Codes: Detail codes can be added if there are important C&TC specific details missing from the provided list that the agency wants to track in C3. A new detail should be added if it will be used regularly. If significant numbers are not anticipated, it is best not to add the detail because it is not worthwhile to track small numbers, and as detail codes are added, the OASR report will lengthen. Currently the report is 2 pages but as codes are added the report will run out of room on 2 pages and lengthen to 3 pages and so on.

Click on Utilities.
- Click on **To View/Edit Contact Detail Codes**… A View/Edit Contact Detail Codes window appears.

![View/Edit Contact Detail Codes](image)

- Use arrows to scroll to view existing detail codes.
- To add detail codes, click on **Add** button. An **Edit Contact Detail Code** window will appear.

![Edit Contact Detail Code](image)

- Fill in **Description** with name of new detail code.
- Create a **Help** window description of the code that will appear when cursor is held over highlighted code on case window.
- When new detail information has been added, click **Save** to add detail to case window detail list. C3 will assign a number automatically to the new detail code.
• The user-added detail will be added to the detail list when user exits the program and re-opens C3.
• Once added, detail codes cannot be deleted.
• Detail codes will appear on the Detail Code list as a choice when entering outreach contacts. They also appear on the OASR and OASR Companion Reports
• Once added, contact detail codes can be disabled and enabled, but not deleted. You can only disable and enable contact details that have a Standard of N and D.

• **Edit Contact Detail Codes:** User can only edit user entered codes.
• Go to **Utilities,** then **View/Edit Contact Detail Codes.** In the Standard column, the possible designations are Y, N and D:
  ▪ *Y* = system generated
  ▪ *N* = user entered; enabled status (only the Disabled function is activated)
  ▪ *D* = user entered, disabled status (only the Enabled function is activated)
• Once added, contact detail codes can be **disabled and enabled,** but not deleted. User can only disable and enable contact details that have a **Standard** designation of **N** or **D.**
• To disable a contact detail with a **Standard** of **N,** highlight the contact detail and click the **Disable** button. The **Standard** will be set to **D.**
• To enable a contact detail with a **Standard** of **D,** highlight the contact detail and click the **Enable** button. The **Standard** will be set to **N.**
• **To edit a Contact Detail Code,** at the **View/Edit Contact Detail Codes** window, double click on the contact detail. The **Edit Contact Detail Code** window will appear. When **Contact Detail** information has been edited, click **Save.**
To View/Add Clinics:

- Click on Utilities.
- Click on View/Add Clinics…. A View/Edit Clinics window will appear. Current clinic list can be viewed by using arrows to scroll up or down.

<table>
<thead>
<tr>
<th>ID #</th>
<th>Clinic Name</th>
<th>Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>730</td>
<td></td>
<td>03/11/2004 10:22</td>
</tr>
<tr>
<td>729</td>
<td></td>
<td>03/10/2004 4:11:42</td>
</tr>
<tr>
<td>733</td>
<td></td>
<td>03/16/2004 2:15:05</td>
</tr>
<tr>
<td>737</td>
<td></td>
<td>04/07/2004 2:37:33</td>
</tr>
<tr>
<td>664</td>
<td></td>
<td>02/26/2003 3:18:00</td>
</tr>
<tr>
<td>660</td>
<td></td>
<td>02/12/2003 4:08:45</td>
</tr>
<tr>
<td>659</td>
<td></td>
<td>02/12/2003 4:08:32</td>
</tr>
<tr>
<td>658</td>
<td></td>
<td>02/12/2003 4:08:32</td>
</tr>
<tr>
<td>630</td>
<td></td>
<td>07/31/2002 10:07</td>
</tr>
</tbody>
</table>

- To add a clinic to list, click on +Add button. An Edit Clinic window will appear.
- Fill in Description bar with clinic name.
- Click Save to add clinic to list. An ID # will automatically be assigned to the added clinic.
- To Edit a Clinic, double click on the entry. An Edit Clinic window appears. Make edits and Save.
To Consolidate Clinics:

User has the option to consolidate clinics when there are multiple listings for a single clinic, for example, C&TC Clinic, C&TC Clinic, P.A., and C&TC Clinics, P.A. If user knows that these 3 clinics are one and the same, consolidating them on the clinic list so only one name appears is helpful. Consolidating clinics only affects the **Primary Care Clinic** drop down listings in the **Case** and **Child** windows, however. It does **not** affect the **Screenings by Provider/Clinic Report**, which will show multiple listings.

- To consolidate clinics, click on **Consolidate**… button on **View/Edit Clinics** window
- A **Consolidate Clinics** window will appear.

- Highlight clinic to be consolidated in **Available Clinic Names** box and double click or click **Add** button. Clinic will be removed from **Available Clinic Names** box and will appear in **Selected Clinic Names** box. Continue selecting clinics to be consolidated. To remove clinics from the **Selected Clinic Names** box, highlight clinic and double click or click **Remove**. This will return clinic to **Available Clinic Names** box.
- When clinics are selected, highlight just one clinic name to consolidate to from the **Selected Clinic Names** box. Click **Add** to add clinic name to **Consolidate To** field. To remove clinic from the **Consolidate To** field, click **Remove**. This will return the clinic name to the **Selected Clinic Names** box.
- When correct choice has been made, click **Consolidate** button in upper left corner. A **Warning** window will appear.
- This choice cannot be undone once made. If you wish to continue, click **Yes** to consolidate. Click **No** to return to **Consolidate Clinics** window.
• Consolidating will re-number all references to the clinics remaining in Selected Clinic Names list to be the one that was selected in the Consolidate To field. The clinics in the Selected Clinic Names list will be deleted.
• The window will reset itself so user can continue consolidating clinics.

Backup Database:
To “Backup Database”: A user that is designated an administrator may periodically backup an individual computer hard drive C3 database. See page 100-102 for complete Backup Policy instructions.
  • Select Backup Database option under Utilities on the main menu bar. The user will be asked for confirmation.
  
  • If Yes is selected, a backup of the database will be copied and will display the file name and folder where the backup was copied.
  • It is suggested that for counties with only one computer, who are not on a network system, that data be backed up every day.
  • Counties who operate multiple computers on a network should carefully review the section in this manual on backups.

C&TC Administrative Services Contractors are responsible for maintaining their C3 and contract data. Backups are critical, therefore, DHS requires daily backup or, at a minimum at least once per week. Please read and follow the complete C3 backup Policy instructions on page 100-102.
C&TC C3 Database Backup Policy:

C&TC Administrative Services Contractors are responsible for maintaining their CATCH 3 and contract data. Backups are critical therefore DHS requires daily backups, or, at a minimum, at least once per week.

It is the responsibility of every C&TC contracting agency to make sure the C&TC Program database (data) is secure. C&TC Coordinators should make sure proper database backups are in place.

There are three options for backing up your database. DHS recommends that you backup your database in all three ways. DHS technical support staff have found that often local network backups cannot guarantee a good recent backup copy. Some agencies without good data backups have lost program database information which is now irretrievable. DHS can only restore past download information (back 5 months) and is not able to restore your local outreach database activities.

The only way to be certain that your program database is secure is to do a combination of backups:

1. Hard drive (local computer) through C3
2. Network, if available
3. CD

DHS recommends that even if your database is backed up on your hard drive (local computer), it should also be backed up on a network drive, if available, and also on a CD.

If your database is backed up on a network and not on your hard drive, you should also back it up on your hard drive and also on a CD.

If you don’t have access to a network drive, you should backup your database on your hard drive and also on a CD.

Below are instructions for these three backup options. Please read through to find the information that pertains to your C&TC Program files set-up. We have tried to make these instructions clear but we understand there are many different levels of technical knowledge. If you or your technical staff have any trouble with these instructions, call Cher Rudolph at 651-431-3305 or Bobbi Post at 651-431-3098 or E-mail: dhs.catchsupport@state.mn.us

1. How to backup your database to your hard drive (local computer) through C3:

A. Every user should be logged off C3 except the person doing the backup
B. Click on “Utilities”
C. Click on “Backup Database”
D. A window will appear asking: “Would you like to make a backup of the database?” Click “Yes”
E. An “Information” box will appear with the following information: For example, “A backup file named “C3_00001.MDB” was created in the backup folder of your “CTCDATA” folder.” For example, the folder might look something like this:

(Drive Letter) C:\CTCDATA\BACK-UP\ or \\NTSERVER\HEALTH\CATCH3\CTCDATA/BACK-UP\ - Universal Naming Convention (UNC Path). C3 places a copy of your database in a special backup folder, click “OK”

F. Each backup file will be assigned a number: For example, “C3_00001.MDB” C3_00002.MDB”, “C3_00003.MDB”, etc.

2. How to backup your database to a Network:

When you backup to your hard drive, you should also backup your database to a network. Backing up to the network protects your data in the event that your hard drive crashes.

A. Create a folder on your network drive to which you have access. To create the folder, go to your Desktop and click on “My Computer.” Choose and open the appropriate directory. Go to the Toolbar and click on “File”, “New”, “Folder”. Type in the new folder name where the cursor is blinking. An example is “C3 BACKUP”. Click away from the folder to save the folder and close the window.

B. Log on to C3, if you aren’t already, and go into the BACKUP folder on the hard drive. To find it, click on “Utilities” then “Configuration”. Write down the database file name. It will begin with the directory letter and look something like this: (Drive Letter) C:\ CTCDATA\ or \\NTSERVER\HEALTH\CATCH3\CTCDATA/ - Universal Naming Convention (UNC Path). This is where the database files are held in a BACKUP folder. Close window.

C. Go to your Desktop and click on “My Computer.” Click on the appropriate directory. In the case above, it is the “C” directory.

D. Once in the appropriate directory, click on the “CTCDATA” folder.

E. In the CTCDATA folder, click on a folder named “BACKUP”.

F. You will see any backup files you have saved. The file name should look something like this: C3_00001.MDB.

G. Right click on the file name with the most recent modified date. Click Copy and close window.

H. Go to your Desktop and click on “My Computer.” Go to your network directory where you created the C3 BACKUP folder and open it. On the toolbar, click on “Edit” and “Paste” and the backup file will appear in that folder. Close the window.

3. How to backup your database to a CD:

Agencies can have problems with backups. Sometimes backups are incomplete, not accessible, corrupt, or have been destroyed, etc. If your network or hard drive crash, you can lose your database. To protect your data further, you should do a backup to a CD.

Contact your IT staff for assistance, as the process of how to backup to a CD may vary from agency to agency. Also, you will need to check with your agency data security staff for your local process for CD storage. DHS recommends off-site storage. Basically, this is what you want to do when backing up your database to a CD.

1. Acquire access to a CD burner.
2. Use re-writeable CDs (RW).
3. Burn a backup copy onto the CD. By using the RW, you can re-format the CD and use it over and over.
Deleting Old Backup Files:

If you have multiple backup files, you may want to delete those periodically to prevent using up too much computer memory. You only need to keep the most recent database file which is the file with the most recent modified date. DHS suggests that at least once a month old C3 database files should be deleted from your backup folder on both your hard drive and your network.

When you delete old files, C3 will reuse the next available number starting with “1”, so the number assigned to the backup will not necessarily tell you which file is oldest. **The only way to determine the most recent backup copy is to use the most recent modified date.**

**How to delete old backup files on your hard drive and on your network:**
Use these instructions to delete old backup files on your hard drive and/or on a network.

A. Logon to C3.
B. Click on “Utilities” then “Configuration”. Write down the database file name. It will begin with the directory letter and look something like this: (Drive Letter) C:\ CTCDATA\ or \\NTSERVER\HEALTH\CATCH3\CTCDATA\ -Universal Naming Convention (UNC Path). This is where the database files are held in a backup folder.
C. Go to your Desktop and click on “My Computer” or “Windows Explorer”. Click on the appropriate directory, in the example above, it is the “C” directory but depending on which backup files you are deleting (on your hard drive or on your network, the directory letters will be different).
D. When you are in the appropriate directory, click on the “CTCDATA” folder.
E. When the CTCDATA folder is opened, click on the file named “BACKUP”.
F. You will see any backup files you have saved. The file name should look something like this: C3_00001.MDB.
G. Highlight the file name to be deleted and press the “Delete” key on your keyboard.
H. A window will appear asking if you are sure you want to delete the file, click “Yes”.
I. Delete all old backup files, but keep the most recent backup file, the file with the most recent modified date.
J. Close window.

Each file that is backed up by C3 is labeled with a number, starting with the number 1. Each backup file will be assigned the next number available. When you delete old backup files, C3 will reuse the next available number starting with “1”. The number in the file name (“1” in the example above) has nothing to do with being the most recent copy. If you have done other backups prior to this, you will see additional files with numbers going up from “1”. **The only way to determine the most recent backup file is to look for the most recent modified date.**

**More information on the C3 Program files and C3 database (data)**

It is appropriate to have the **C3 database** (data) on your **network**, however, the **C3 Program files** should **always be installed on your hard drive and never on your network**. DHS will not support the C3 Program files unless it is installed on your hard drive.

**Note:** People have been asking if it is okay to use a flash drive to back up their data. Our C&TC technical support staff does not recommend using flash drives. It is believed that they are too new to be trusted to back up your data.
Configuration: **This is an option that CATCH users should NOT use.** This feature should only be utilized under the direction of CATCH support staff at DHS. It gives the system configuration information for county IT and DHS staff. The **Preview Reports Before Printing** box should always remain checked.

Exit C3: Sometimes the X button on the top right hand corner of the window may be obstructed by the office toolbar. This menu item was provided under **Utilities** to make it easier to exit CATCH in this case.

- To Exit, click **Utilities**, then click **Exit C3**.
- A **Confirm** window appears. Click yes or no.

![Confirm Window]

- There is also an **Exit** button on the main menu bar which can be used to exit the C3 program.

**Important: C3 users should log off C3 at the end of the work day.** When the user does the next logon to C3, the system automatically updates the 21 year olds to make them inactive. If C3 is left open from day to day, the 21 years olds do not get updated in the database.

**View (main menu bar):**

**To view Window List:**

- Click on **View** in the main menu bar.
- Click on **Window List**. A **C3 Window List** window will appear. This gives user a list of all open windows. User can then select desired window to bring to top (view) by clicking on that window. For users who open multiple windows, this will be useful in tracking total open windows.
- This feature is also important for agencies with multiple users as a way to check if all users are logged off CATCH before:
  - Downloading
  - Backing up database
  - Any work on shared network occurs

**About C3:** This option under **View** gives basic identifying information about CATCH.
CATCH 3 Technical Manual

Introduction

This technical manual is being provided to help aid technical staff with diagnosis of problems that may occur with CATCH 3. It is assumed that the person reading this manual has a certain level of technical expertise so some terms may be used that a basic user will not understand.

File Names and Folders

There are two directory structures that C3 uses, the program directory and the data directory. The user is given an opportunity to specify both of these directories during installation.

Program Directory

The program directory defaults to C:\Program Files\DHS\CATCH3. This location can be changed during installation, but should always be a local drive. Failure to specify a local drive location may cause problems during download. This directory will contain the following:

CATCH3.EXE

This is the C3 loading program. It is a small program that is responsible for running the different portions of C3. It also tracks whether C3 is already running so that multiple copies are not loaded at the same time.

The first thing it does is check to see if the CATCH3.MDB file exists in the data directory. If it does not exist, it will load the data conversion program to allow the user to create a new database. This process should only occur once for obvious reasons.

It also checks for any program updates that were received during the download. See Program Update Process for more information.

If the CATCH3.MDB file exists in the data directory, it will load C3PROG.EXE.

If C3PROG.EXE is exited with a code, CATCH3.EXE will determine what action to take. A code is used to run C3DLoad.EXE.

C3PROG.EXE

This is the user interface portion of C3. It must be run by CATCH3.EXE. Trying to run it without CATCH3.EXE will generate an error message.
C3Load.EXE

This is the C3 Downloader. This program must be run by CATCH3.EXE. Trying to run it without CATCH3.EXE will generate an error message.

C3DataConv.EXE

This is the C3 Data Conversion program. It can be run by itself. It requires that the BDE (Borland Database Engine) be installed on the same computer that it is run. CATCH II v1.9 components should also be installed and properly configured on the computer that the program will run. There must be an Export folder in the folder from which this program will be run. C3DataLoad.EXE will be run automatically if the user indicates that CATCH II v1.9 is installed on the same computer as C3.

C3DataLoad.EXE

This is the C3 Data Load program. It can be run by itself. It must be run on the same computer that C3 is installed from the program directory. It takes the information exported by C3DataConv.EXE, stored in the Export folder, and loads it into CATCH3.MDB.

CATCH3.CFG

The C3 configuration file. It uses the INI file format and contains one section, [Shared Data], and one value within that section, DATA LOCATION. DATA LOCATION is the data directory path.

LASTUPD.DAT

Contains the date on which the C3 program was last updated by the downloader. See Program Update Process for more information.

BATCHTXT folder

This contains the file DSN BatchFiles.DSN and is the location where data will be written that is intended to be loaded into the C3 database.

TEMPDATA folder

This is the location that temporary data will be written by C3. When letters are printed, the data will be written to this directory and then merged with the Microsoft Word letter template document. This is also the location where data files will be written if the user selects not do automatic mail merges.
EXPORT folder

The location that the data conversion process uses to store data exported for CATCH II.

Data Directory

The data directory defaults to `<program directory>\CTCDATA`. This location can be changed during installation. If multiple computers are sharing the data, it must be a directory that is located on a network drive and that is accessible by all of the users that will be using C3.

CATCH3.MDB

This is the Microsoft Access 97 database that contains ALL of the C3 data. It should not be deleted or moved from the data directory. This database may be converted to Access 2000 if the county is certain that Access 97 will never be used to access the data.

MTCATCH3.MDB

This is the empty database that is copied and filled with data to create the CATCH3.MDB file.

REPORTS Folder

This is the location of the report DLLs.

LETTERS Folder

This is the location of the letter template documents that are used by C3.

UPDATE Folder

This is the location of program updates that are downloaded from the State. See Program Update Process for more details.

BACKUP Folder

This is the location where backups of CATCH3.MDB will be copied when a user chooses to make a backup.

LOGS Folder

This is the location of the download logs. Download log files will be named according to the download ID assigned to the download and will begin with DL.
Program Update Process

Whenever CATCH3.EXE is run, it will look to see if there is an UPDATE directory in the data directory. If the directory is there, it will load the LASTUPD.DAT file that contains the date when the UPDATE directory was last loaded with update files. It then compares that date to the contents of the LASTUPD.DAT file in the program directory, if it exists. If the UPDATE directory has a more recent date than the date stored in the program directory or the program directory doesn’t have a LASTUPD.DAT file, all of the contents of the UPDATE directory, including subdirectories, will be copied to the program directory. It will only copy files if the date of the file in the UPDATE directory is more recent than the date in the program directory.

Data Tables

See the data dictionary for more specifics on columns and data types used within the tables.

Case and Child Information

CASE Table

Contains all of the basic information about a case. The CASE_NO and COUNTY_CODE fields make up the primary key. CONTACT_SEQ_ID points to the CONTACT_INFO record that is currently active for the Case.

CONTACT_INFO Table

Contains the contact information history for Cases. The primary key is CONTACT_SEQ_ID. This table has a one-to-many relationship with the CASE table where joined by CASE_NO and COUNTY_CODE. The record with the most recent UPDATED_DATE for a particular CASE_NO and COUNTY_CODE is the active record for the CASE.

CHILD Table

Contains all of the basic information about a child. The PMI_NO field is the primary key. This table has a one-to-many relationship with the CASE table where joined by CASE_NO and COUNTY_CODE.

CHECKUP Table

Contains all of the checkup information for the children. The CHECKUP_SEQ_ID field is the primary key. This table has a one-to-many relationship with the CHILD table where joined by PMI_NO.
Outreach Activity Information

OUTREACH_ACTIVITY Table

Contains all of the outreach activity information. The OUTREACH_ACTIVITY_SEQ_ID field is the primary key. This table has a one-to-many relationship with the CASE table where joined by CASE_NO and COUNTY_CODE.

CONTACT_DETAIL Table

Contains all of the contact details related to outreach activities. The CONTACT_DETAIL_SEQ_ID field is the primary key. This table has a one-to-many relationship with the OUTREACH_ACTIVITY table where joined by OUTREACH_ACTIVITY_SEQ_ID.

Letter Information

LETTER_BATCH Table

This table contains the date and type of letter batch created. The LETTER_BATCH_SEQ_ID field is the primary key.

LETTER Table

This table contains the letter data. The LETTER_SEQ_ID field is the primary key. This table has a one-to-many relationship with the LETTER_BATCH table. This table also has a one-to-one relationship with the OUTREACH_ACTIVITY table joined on OUTREACH_ACTIVITY_SEQ_ID.

Download Information

DOWNLOAD Table

Contains the basic information about a download including a snapshot of the number of active cases and children. The DOWNLOAD_ID field is the primary key.

DOWNLOAD_STATUS Table

Contains information about the children that are added or reactivated during the download. The DOWNLOAD_STATUS_ID field is the primary key. This table has a one-to-many relationship with the DOWNLOAD table joined on DOWNLOAD_ID.
Editing and Writing Queries

The following section will cover writing queries to access particular sets of information within C3. It is assumed that the person reading this information has a working knowledge of Microsoft Jet SQL.

Obtaining the Current Contact Information of a Case

```
SELECT
    ADDRESS1,
    ADDRESS2,
    CITY,
    STATE,
    ZIP,
    PHONE_NUMBER,
    UPDATED_DATE
FROM
    [CASE] INNER JOIN CONTACT_INFO ON [CASE].CONTACT_SEQ_ID = CONTACT_INFO.CONTACT_SEQ_ID
WHERE
    CASE_NO = '<a case #>'
    AND COUNTY_CODE = '<3-digit county code>'
```

Obtaining the Contact History Information for a Case

```
SELECT
    ADDRESS1,
    ADDRESS2,
    CITY,
    STATE,
    ZIP,
    PHONE_NUMBER,
    UPDATED_DATE
FROM
    [CASE] INNER JOIN CONTACT_INFO ON [CASE].COUNTY_CODE = CONTACT_INFO.COUNTY_CODE AND [CASE].CASE_NO = CONTACT_INFO.CASE_NO
WHERE
    CASE_NO = '<a case #>'
    AND COUNTY_CODE = '<3-digit county code>'
```
Obtaining list of Currently Active Cases

```
SELECT
    CHILD.CASE_NO,
    CHILD.COUNTY_CODE,
    COUNT( IIF( NOW >= CHILD.ACTIVE_BEGIN_DATE AND (CHILD.ACTIVE_END_DATE IS NULL OR NOW <= CHILD.ACTIVE_END_DATE ) , CHILD.PMI_NO, NULL ) ) AS CHILD_COUNT
FROM
    [CASE] INNER JOIN CHILD ON [CASE].CASE_NO = CHILD.CONTACT_SEQ_ID AND [CASE].COUNTY_CODE = CHILD.COUNTY_CODE
GROUP BY
    CHILD.CASE_NO,
    CHILD.COUNTY_CODE
HAVING
    COUNT( IIF( NOW >= CHILD.ACTIVE_BEGIN_DATE AND (CHILD.ACTIVE_END_DATE IS NULL OR NOW <= CHILD.ACTIVE_END_DATE ) , CHILD.PMI_NO, NULL ) ) > 0
```

Obtaining list of Currently Active Children

```
SELECT
    PMI_NO
FROM
    CHILD
WHERE
    NOW >= ACTIVE_BEGIN_DATE
    AND ( ACTIVE_END_DATE IS NULL OR NOW <= ACTIVE_END_DATE )
```

Including User Enterable Parameters Within a CATCH 3 Query

When creating a query within C3, the user may include parameters that C3 will include on the query options window when the query is run. This is how the query options are requested for the Case and Child filters, for example. Parameters are enclosed within curly braces ({ and }). If a parameter is left blank by the user on the query options window, the entire line on which the parameter is located will be deleted before the query is run. The syntax for a parameter is `{ parameter | prompt }`. The parameter should be chosen from the list below. The prompt is the title of the control that will be created to get the parameter data. If a parameter is proceeded by a plus (+) sign, the field must be filled in by the user to run the query.

Since the line of an empty parameter will be deleted from the SQL statement, be sure that the query is written so that it will still run if the line is removed. For example, if the parameter is part of the only comparison in the WHERE or HAVING clause and it is optional, include the parameter on the same line as the WHERE or HAVING key word so that it will also be deleted.
### Available Parameters:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>AGEMIN</td>
<td>Translates to the low end date for the age. Use this parameter for comparison against the BIRTH_DATE of a child. The comparison operator &lt;= will be included as part of what the parameter is replaced with for ease of use. The date generated for comparison will be the date where the child becomes the age entered.</td>
<td>Example: AND BIRTH_DATE {AGEMIN</td>
</tr>
<tr>
<td>AGEMAX</td>
<td>Translates to the high end date for the age. Use this parameter for comparison against the BIRTH_DATE of a child. The comparison operator &gt; will be included as part of what the parameter is replaced with for ease of use. The date generated for comparison will be midnight on the last day that the child will be the selected age.</td>
<td>Example: AND BIRTH_DATE {AGEMAX</td>
</tr>
<tr>
<td>NATIONALITY</td>
<td>Allows entry of a single nationality code. The comparison operator must be included.</td>
<td>Example: AND NATIONALITY_CODE = {NATIONALITY</td>
</tr>
<tr>
<td>NATIONALITIES</td>
<td>Allows entry of none or more nationality codes. The comparison operator must be included.</td>
<td>Example: AND NATIONALITY_CODE IN {NATIONALITIES</td>
</tr>
<tr>
<td>LANGUAGE</td>
<td>Allows entry of a single language code. The comparison operator must be included.</td>
<td>Example: AND LANGUAGE_CODE = {LANGUAGE</td>
</tr>
<tr>
<td>LANGUAGES</td>
<td>Allows entry of none or more nationality codes. The comparison operator must be included.</td>
<td>Example: AND LANGUAGE_CODE IN {LANGUAGES</td>
</tr>
<tr>
<td>TEXT</td>
<td>Allows entry of text. Do not include the comparison operator since it will be included based on the text entered by the user. “LIKE” will be used if the user enters a wildcard character, otherwise “=” will be used.</td>
<td>Example: AND LAST_NAME {TEXT</td>
</tr>
<tr>
<td>NUMBER</td>
<td>Allows entry of number. The comparison operator must be included.</td>
<td>Example: AND &lt;a count&gt; &gt; {NUMBER</td>
</tr>
<tr>
<td>GENDER</td>
<td>Allows selection of a gender. The comparison operator must be included.</td>
<td>Example: AND GENDER_CODE = {GENDER</td>
</tr>
<tr>
<td>DATE</td>
<td>Allows entry of a date. The comparison operator must be included.</td>
<td>Example: AND CREATED_DATE &gt; {DATE</td>
</tr>
<tr>
<td>COUNTY</td>
<td>Allows for selection of county if multi-county installation. This parameter will never be displayed if only one county is listed in the Configuration window. The comparison operator must be included.</td>
<td>Example: AND COUNTY_CODE = {COUNTY</td>
</tr>
</tbody>
</table>
CATCH 3 Technical Tips
Errors/Issues and Resolutions
By DHS CATCH3 support staff
November, 2007

This section was created for technical staff to aid in fixing common local CATCH problems. If there are continuing problems, contact Bobbi Post – 651-431-3098 or Cher Rudolph – 651-431-330.

Error:
Data not saved because of the following error:  Failed to increment value sequence “OUTREACH_ACTIVITY_s1”

Resolutions:
1) Log off and then on again
2) If the above suggestion doesn’t resolve the issue, then repair the database

Error:
“Not a valid bookmark” when trying to print case reports.  (This error can occur for a multitude of reasons)

Resolutions:
Database could be corrupt and needs to be repaired.
If the database repair doesn’t work, go back and grab a recent copy from the server backup and replace the current corrupt database.
If no backups are available, Bobbi or Cher can re-create a database with downloads, but it will not contain any outreach activities, as those are entered by the end user.

Error:
“Un-recognized database format”.

Resolution:
Database is corrupt. Get the most recent backup copy from the server, and replace the corrupt database named Catch3.mdb.

Error:
“Could not covert variant of type (Null) into type (Integer)

Resolution:
This error is due to a corrupted table in MDB. Try removing bad # signs. Then repair and continue, if possible.

Error:
“You have already generated a standard letter batch for today. You will need to wait until tomorrow to perform a download. The download should always be performed before standard letter batches are generated.”

**Resolution:**
Wait until the next day and do the download again.

**Error:**
“Data provider or other service returned an E_FAIL status.”

**Resolution:**
Database was corrupt. Get the most recent backup copy of the database from the server and replace the corrupt database named Catch3.mdb.

**Error:**
“List index Out of Bounds”

**Resolutions:**
Possible non-active user accessing account. User needs to be active in order to edit history. If this error appears for any other reason, you will need to repair the database.

**Error:**
“The Microsoft Jet database engine stopped the process because you and another user are attempting to change the same data at the same time.”

**Resolution:**
There may have been work being done on the server, and the end user had CATCH 3 open at the same time. The database became corrupt. Try repairing it. If that does not work, get the most recent backup copy from the server and replace the corrupt database named Catch3.mdb.

**Error:**
“00/00/ is not a valid date.”

**Resolution:**
Try repairing database.

**Error:**
Missing clinic list.

**Resolution:**
DHS will check the database, and will have end user upload it to the DC1 mailbox in MN-ITS. Bobbi or Cher will import a new y_clinic table and return it to the county. During this time frame, no one will be able to work CATCH 3. Rename the Catch3.mdb to *countynamemdb* to upload in MN-ITS.

**Error:**
“Connection refused.”

Resolution:
This may possibly be a firewall issue. To rule this out, the network technician should be at the computer used to perform the download when logged in as you to make sure that the network firewall will allow you to go out through Port 21 and return files back through Port 22.

1. In a DOS window, in a target test directory, type `FTP SYSB.STATE.MN.US`
2. Press Enter.
3. When asked for user, type `pwftp03`
4. Press enter.
5. When asked to “send password please”, type `password`
6. Press Enter.
7. When the ftp prompt appears, type `cd ‘SOC.MW100000.PROD.USER’`
8. Press Enter.
9. After the changed directory message appears, type `binary`
10. Press Enter.
11. Type `get COenter two-digit county number00**.ok` (*The ** represents the current download number for your county. Call Bobbi or Cher to get this number.*)
12. Click Okay or press Enter.
13. Type `quit (or exit, if quit doesn’t work)`.
14. Press Enter.

The technical assistant should look for where they FTP’d the file and make sure it’s there. The file cannot be merged into the current database, but this is a test for DHS to make sure the ports 21 and 22 are open on the firewall. Please note: If firewall staff make changes to the firewall, they must make sure that ports 21 and 22 are open to go out and retrieve the downloads.

Error:
“MSJet database engine cannot open the file”

Resolution:
Give the person full rights to the directory by going into the security Advanced option; this will force permission changes on all child objects and should correct the problem.

Error:
550 Dataset error when trying to download
This is the message you’ll see on the downloader screen when you have the problem described:
Resolution:

On the main toolbar in CATCH 3, click “Utilities.” Then click “Configuration.” Look at the “Supported Counties” window at the bottom of the CATCH 3 Configuration screen. Your county number should be listed, followed by a colon (:) followed by your county name. Directly underneath that entry, there may be a colon (:) or a semicolon (;). This may be very hard to see, or you may not be able to see it at all. If this colon or semicolon is present, the downloader will believe that this is another county in the list. It will then try to download data for that county, also, when it downloads your data. Unfortunately, that “county” does not have a number or a name, so the downloader will then abort the entire download process, and display the error message shown above.

To resolve this, you will need to remove the colon or semicolon from the “Supported Counties” window. To do this, first click the name of your county to highlight it. Then click the “Remove” button at the bottom left of the configuration window. Then click “Yes” to the prompt “Are you sure you want to delete?” warning.

After you have deleted your county, click again inside the “Supported Counties” window, even though it now appears empty. Then click the “Remove” button again, for a total of about 5 times, to make sure the colon or semi-colon has been deleted. Afterwards, you will need to put your county back into the “Supported Counties” list. Click the add button, and type in your 3 digit county number. Then click “OK”. You should now see your county name and number in the “Supported Counties” window. Click “OK” to close the CATCH 3 Configuration screen. Try your download again. It should be successful.

If any of the above-listed resolutions do not resolve your issues, please call Bobbi or Cher for assistance at the numbers below:
Bobbi Post – 651-431-3098
Cher Rudolph – 651-431-3305
Information and Tips on CATCH 3

Situation:
When you are attempting to add a new query under Utilities, Run/Edit Queries, and see the Edit Query and Add Query buttons grayed out, you will need to have someone within your group who has admin rights give you admin rights in order to activate these buttons. See example below:

![Available Queries](image)

Situation:
Trouble logging into Catch3 -- Receiving message “You are already logged in to the system.”

Go to C:\Program Files\DHS\Catch3 and open the catch3.cfg file (opens in Notepad). This file points to your CTCData folder. Write down the path for your data. Go to ‘My Computer’ or ‘Windows Explore’, and find the database from the path you wrote down.

First, make certain all other users have exited the database. Go into the CTCData folder and double-click to open the Catch3.mdb file. Once you are in the tables section, look for the table named WORKER_LOGGED_IN and open the table. If anyone is listed in this table as logged on, then highlight that row by clicking on the gray square in front of the row and push delete on your keyboard. When you exit this table, this is how it should appear:

![WORKER_LOGGED_IN: Table](image)

You can exit Microsoft Access and log into CATCH 3 at this point.

Situation:
Problems running reports

One of the most common problems that counties experience when working with reports occurs when clicking “Reports”, then “Run Report” on the main toolbar. When the “CATCH 3 Reports” window comes up, instead of the usual list of 14 reports that should be visible, the window is either blank, or
some of the reports, when run, do not run properly. This indicates that there is a problem with the report templates themselves.

Notify DHS, specifically, Bobbi who will guide the user to MN-ITS to download a zip file from the 4900022-00 DC1 mailbox.

Once you retrieve and save the zip file, navigate to the CTCDATA folder that contains your data (either on your hard drive or on your network) and rename the “Reports” folder to “Old Reports”. Then, create a new folder (directory) called “Reports” inside your CTCDATA folder. Then, go to the zip file (wherever you saved that file) and double click the zip file. Unzip the file to the new “Reports” folder you just created. Then, open CATCH 3 and attempt to run a report. If you have followed the above steps correctly, the new templates should work appropriately.

**Situation:**
Receiving the following message:

![Confirm](image)

Go to C:\Program Files\DHS\Catch3 and open the catch3.cfg file (opens in Notepad). Verify the path in the config file is pointing to the correct location of your data. Occasionally, the config file loses the path, and defaults to the hard drive. It would then need to be redirected to the correct database path. In the config file, you can use either a drive letter, or UNC naming convention. It must begin right next to the equal (=) sign in the config file, and should end with CTCDATA\. You do not need to add the Catch3.mdb in the path. The program knows where to look once it’s in the CTCDATA folder. You must make sure that after ‘CTCDATA folder’, you include the backslash, or the program will not work.

**Situation:**
The following images show what your CATCH 3 folder should contain. Please note that the dates on the large red 3’s are important. These are your required executable files. You will also need to make sure you have the midas.dll file, as shown. Without it, the CATCH 3 program will not work.

Below are the correct dates for the program files. These files should remain on the **hard drive** for the optimal performance of the CATCH 3 program.
Appendix B - CATCH 3 Technical Tips January 2008

Below is what your CTCDATA folder should contain:

<table>
<thead>
<tr>
<th>Name</th>
<th>Size</th>
<th>Type</th>
<th>Date Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>BACKUP</td>
<td></td>
<td>File Folder</td>
<td>05/17/2007 7:07 AM</td>
</tr>
<tr>
<td>Letters</td>
<td></td>
<td>File Folder</td>
<td>05/11/2007 10:09 AM</td>
</tr>
<tr>
<td>LOGS</td>
<td></td>
<td>File Folder</td>
<td>07/11/2007 8:38 AM</td>
</tr>
<tr>
<td>REPORTS</td>
<td></td>
<td>File Folder</td>
<td>05/11/2007 10:07 AM</td>
</tr>
<tr>
<td>UPDATE</td>
<td></td>
<td>File Folder</td>
<td>05/11/2007 10:07 AM</td>
</tr>
<tr>
<td>C3UPDATES.mdb</td>
<td>642 KB</td>
<td>Microsoft Office Acc...</td>
<td>03/20/2006 10:10 AM</td>
</tr>
<tr>
<td>CATCH3.MDB</td>
<td>178,338 KB</td>
<td>Microsoft Office Acc...</td>
<td>07/25/2007 11:17 AM</td>
</tr>
</tbody>
</table>

**CATCH 3 Program files are found on C:\Program files\DHS\Catch3**

There are three directories named **Batchtxt**, **Export** and **Tempdata**, then six red 3’s (program files) named C3DataConv.exe, C3DataLoad.exe, C3DLoad.exe, C3Prog.exe, C3SynchDB.exe and Catch3.exe. Also in with the program files should be Catch3.cfg this is the configuration file that points to the data (CTCDATA Directory) Then there is a midas.dll file and a lastupd.dat and a readme file dated 1/29/02.

In the CTCDATA directory, either on the hard drive or the network, are these files:

5 Folders/Directories named Backup, Letters, Logs, Reports and Updates and then two Access Databases C3updates.mdb and Catch3.mdb. The main Data base that holds all the data is named catch3.mdb.
These files and directories should not be mixed together between the program files and the Data base files. The program will not work correctly if these files are placed in different directories.

**Installing CATCH 3 on a computer that does not currently have CATCH 3 on it.**

*** Important note - CATCH 3 is no longer installed via CD ROM. No registry entries are needed for CATCH 3.

When the data is on your network, use Step 1.
When the data AND program files are on one hard drive, use Step 2.
When the data AND program files are on one hard drive, AND you want to have multiple users in CATCH 3, use Step 3.

1. When moving the CATCH 3 program, if you have CATCH 3 on another computer, go to C:\program files\dhs\Catch3 (this is the default location for the CATCH 3 program files.) Make a copy of the entire CATCH 3 folder, and place it on your network. Go to the new computer that you wish to put the CATCH 3 program on, and cut and paste the program from the network to the default path C:\program files\dhs\Catch3. Please create any shortcuts for the desktop from the Catch3.exe file.

2. Make a copy of the entire CATCH 3 folder, and place it on your network. Go to the new computer that you wish to put the CATCH 3 program on, and cut and paste the program from the network to the default path C:\program files\dhs\Catch3. Since the CTCD ata folder is in the CATCH 3 folder, the data will move to the new computer with the program. Please create any shortcuts for the desktop from the Catch3.exe file.

3. Open the CATCH 3 folder, and cut the CTCD ata folder and place it on your network. (NOTE: Please note that everything within the CTCD ata folder must be kept intact.) Open the CATCH 3 folder on the hard drive, and open the Catch3.cfg file, which will then open in Notepad. Change the path to the new data location on the network. You can either use a drive letter or UNC format within the path. Once the config is set, you may make copies of the CATCH 3 folder, and place a copy of the entire CATCH 3 program somewhere on your network, so that you can copy it down to several different work stations, if needed. Please create any shortcuts for the desktop from the Catch3.exe file.

**Moving the Catch3 database**

When you are moving the CATCH 3 database from one server to another, please follow these simple tips to verify everything has been done correctly.

1. **Make a copy of the entire CTCD ata folder before you move the entire CTCD ata folder to the new location on the server.** Then go to each person’s hard drive (that has CATCH 3) “C:\ProgramFiles\DHS\Catch3” and change the configuration file named “Catch3.cfg” (which should open in Notepad) to the new location path. If the program files are on the same server as the CTCD ata folder then you must change the configuration file on the network where the program files are and then give everyone a new shortcut icon from the Catch3.exe file (located with the program files in the Catch3 folder).
2. Once the move of the CTCData folder is complete and the configuration file or files have been changed to the new location, **you must verify that everyone is seeing the correct information.** Go to Reports, run report and run a download results report and verify that the current download date is correct in the report. Also go to letters, batch print letters and verify that the date on the last letter batch ran on the left side of your letter batch window under available batches is correct.

3. Anytime you are making changes to the catch3.mdb file please make a copy first incase things don’t go right while making your changes.

**Situation:**
Compact the CATCH 3 Database

**WARNING!!** It is **imperative** that **ALL USERS EXIT CATCH 3 BEFORE COMPACTING DATABASE**!

The CATCH 3 database should be compacted at least once per month. Open the CATCH 3 program. Go to ‘Utilities,’ then ‘configuration.’ Note the name shown in “database file name.” Copy this name and put it into Windows Explore. Put this copied text into the **address** line within Windows Explore. Hit enter. You MAY receive a message that you cannot make changes to the database here. That’s normal. It will open up the database for you. The changes the message refers to are “programmer changes”, which you will not be doing anyway.

**NOTE:** You must have Microsoft access installed on your computer to open this database. Once the database opens, look on the toolbar for ‘tools’, then ‘database utilities’, then ‘compact’ or ‘compact and repair.’ You will notice that the tables disappear. The compacting process may take several minutes. When compacting is complete, the tables will reappear. You may also see another message stating that you cannot make changes to the database. When complete, close the database and enter the CATCH 3 program.

**C&TC C3 Database Backup Policy:**

C&TC Administrative Services Contractors are responsible for maintaining their CATCH 3 and contract data. Backups are critical therefore DHS recommends daily backups, or, at a minimum, **at least once per week.**

It is the responsibility of every C&TC contracting agency to make sure the C&TC Program database (data) is secure. C&TC Coordinators should make sure proper database backups are in place.

There are three options for backing up your database. DHS recommends that you backup your database in all three ways. DHS technical support staff have found that often local network backups cannot guarantee a good recent backup copy. Some agencies without good data backups have lost program database information which is now irretrievable. DHS can only restore past download information (back 5 months) and is not able to restore your local outreach database activities.

The only way to be certain that your program database is secure is to do a combination of backups:
4. hard drive (local computer) through C3
5. network, if available
6. CD

DHS recommends that even if your database is backed up on your hard drive (local computer), it should also be backed up on a network drive, if available, and also on a CD.

If your database is backed up on a network and not on your hard drive, you should also back it up on your hard drive and also on a CD.

If you don’t have access to a network drive, you should backup your database on your hard drive and also on a CD.

Below are instructions for these three backup options. Please read through to find the information that pertains to your C&TC Program files set-up. We have tried to make these instructions clear but we understand there are many different levels of technical knowledge. If you have any trouble with these instructions, please contact the DHS C&TC technical support staff immediately, call Cher Rudolph at 651-431-3305 or Bobbi Post at 651-431-3098 or E-mail: dhs.catchsupport@state.mn.us

1. How to backup your database to your hard drive (local computer) through C3:
   G. Every user should be logged off C3 except the person doing the backup
   H. Click on “Utilities”
   I. Click on “Backup Database”
   J. A window will appear asking: “Would you like to make a backup of the database?” Click “Yes”
   K. An “Information” box will appear with the following information: For example, “A backup file named “C3_00001.MDB” was created in the backup folder of your “CTCDATA” folder.” For example, the folder might look something like this:
      (Drive Letter) C:\CTCDATA\BACK-UP\ or
      \NTSERVER\HEALTH\CATCH\CTCDATA/BACK-UP\ - Universal Naming Convention (UNC Path). C3 places a copy of your database in a special backup folder, click “OK”
   L. Each backup file will be assigned a number: For example, “C3_00001.MDB” “C3_00002.MDB”, “C3_00003.MDB”, etc.

2. How to backup your database to a Network:
   When you backup to your hard drive, you should also backup your database to a network. Backing up to the network protects your data in the event that your hard drive crashes.
   I. Create a folder on your network drive to which you have access. To create the folder, go to your Desktop and click on “My Computer.” Choose and open the appropriate directory. Go to the Toolbar and click on “File”, “New”, “Folder”. Type in the new folder name where the
cursor is blinking. An example is “C3 BACKUP”. Click away from the folder to save the folder and close the window.

J. Log on to C3, if you aren’t already, and go into the BACKUP folder on the hard drive. To find it, click on “Utilities” then “Configuration”. Write down the database file name. It will begin with the directory letter and look something like this: (Drive Letter) C:\CTCDATA\ or \\NTSERVER\HEALTH\CATCH3\CTCDATA/ - Universal Naming Convention (UNC Path). This is where the database files are held in a BACKUP folder. Close window.

K. Go to your Desktop and click on “My Computer.” Click on the appropriate directory. In the case above, it is the “C” directory.

L. Once in the appropriate directory, click on the “CTCDATA” folder.

M. In the CTCDATA folder, click on a folder named “BACKUP”.

N. You will see any backup files you have saved. The file name should look something like this: C3_00001.MDB.

O. Right click on the file name with the most recent modified date. Click Copy and close window.

P. Go to your Desktop and click on “My Computer.” Go to your network directory where you created the C3 BACKUP folder and open it. On the toolbar, click on “Edit” and “Paste” and the backup file will appear in that folder. Close the window.

3. How to backup your database to a CD:

Agencies can have problems with backups. Sometimes backups are incomplete, not accessible, corrupt, or have been destroyed, etc. If your network or hard drive crash, you can lose your database. To protect your data further, you should do a backup to a CD.

Contact your IT staff for assistance, as the process of how to backup to a CD may vary from agency to agency. Also, you will need to check with your agency data security staff for your local process for CD storage. DHS recommends off-site storage. Basically, this is what you want to do when backing up your database to a CD.

4. Acquire access to a CD burner.
5. Use re-writeable CDs (RW).
6. Burn a backup copy onto the CD. By using the RW, you can re-format the CD and use it over and over.

Deleting Old Backup Files:

If you have multiple backup files, you may want to delete those periodically to prevent using up too much computer memory. You only need to keep the most recent database file which is the file with the most recent modified date. DHS suggests that at least once a month old C3 database files should be deleted from your backup folder on both your hard drive and your network.

When you delete old files, C3 will reuse the next available number starting with “1”, so the number assigned to the backup will not necessarily tell you which file is the oldest. The only way to determine the most recent backup copy is to use the most recent modified date.
How to delete old backup files on your hard drive and on your network:
Use these instructions to delete old backup files on your hard drive and/or on a network.

A. Logon to C3.
B. Click on “Utilities” then “Configuration”. Write down the database file name. It will begin with the directory letter and look something like this: (Drive Letter) C:\ CTCDATA\ or \\NTSERVER\HEALTH\CATCH3\CTCDATA\ - Universal Naming Convention (UNC Path). This is where the database files are held in a backup folder.
C. Go to your Desktop and click on “My Computer” or “Windows Explorer”. Click on the appropriate directory, in the example above, it is the “C” directory but depending on which backup files you are deleting (on your hard drive or on your network, the directory letters will be different).
D. When you are in the appropriate directory, click on the “CTCDATA” folder.
E. When the CTCDATA folder is opened, click on the file named “BACKUP”.
F. You will see any backup files you have saved. The file name should look something like this: C3_00001.MDB.
G. Highlight the file name to be deleted and press the “Delete” key on your keyboard.
H. A window will appear asking if you are sure you want to delete the file, click “Yes”.
I. Delete all old backup files, but keep the most recent backup file, the file with the most recent modified date.
J. Close window.

Each file that is backed up by C3 is labeled with a number, starting with the number 1. Each backup file will be assigned the next number available. When you delete old backup files, C3 will reuse the next available number starting with “1”. The number in the file name (“1” in the example above) has nothing to do with being the most recent copy. If you have done other backups prior to this, you will see additional files with numbers going up from “1”. The only way to determine the most recent backup file is to look for the most recent modified date.

More information on the C3 Program files and C3 database (data)

It is appropriate to have the C3 database (data) on your network; however, the C3 Program files should always be installed on your hard drive and never on your network. DHS will not support the C3 Program files unless it is installed on your hard drive.

Note: People have been asking if it is okay to use a flash drive to back up their data and our C&TC technical support staff does not recommend using flash drives. It is believed that they are too new to be trusted to back up your data.
Child and Teen Checkups (C&TC) CATCH3 (C3)
“Verifying Program File Dates” Instructions

March 2008

Please Note:

These instructions have been written for your C&TC technical staff only. If you have limited access to your technical staff or they are not available when it is time to verify your C3 program file dates, please call Bobbi Post at: 651-431-3098 or Cher Rudolph at 651-431-3305 and they will walk you through this process.

It is vital that your C3 program files reflect the most current program file dates. If you do not have the most current program file dates, it will cause the data to be incomplete or incorrect. Sometimes, when these program files are wrong, they can corrupt the data in your database.

It is very important that these program files be updated on EACH computer that has C3 installed. Please be sure you inform your technical staff that before they start working on the local system/server, they must notify all C3 users to close the C3 program. In some cases, technical staff has failed to notify C3 users that work was being done on the local system/server while a user had the C3 program open, which resulted in corrupt data or damage to the database.

Please ask your technical staff to follow the instructions below to verify C3 program file dates are the most current dates as listed below.

<table>
<thead>
<tr>
<th>File Name</th>
<th>Size</th>
<th>Type</th>
<th>Date Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>C3Load.exe</td>
<td>1,270 KB</td>
<td>Application</td>
<td>11/01/2005 4:02 PM</td>
</tr>
<tr>
<td>C3PROG.exe</td>
<td>3,300 KB</td>
<td>Application</td>
<td>11/03/2005 12:19 PM</td>
</tr>
<tr>
<td>CATCH3.EXE</td>
<td>402 KB</td>
<td>Application</td>
<td>11/01/2005 4:02 PM</td>
</tr>
</tbody>
</table>

The C3 support staff strongly advises contractors to have their technical staff verify the C3 program file dates at a minimum of twice per year to verify that you have the most current C&TC program file dates.

Locate your C3 program files, either on the hard drive or on the network server, depending on where the desktop shortcut points. Check the “Date Modified.”

If your program file dates are not the correct “Date Modified” go into the CTCData folder, and open the Update folder. Use these update files to replace any outdated files on the user’s computer in the appropriate folder housing these files.

IMPORTANT!!! When you replace old program files with the newest ones, it is imperative that you destroy any existing desktop shortcuts to the C3 program. You will need to create new shortcuts. Failure to do so can cause your data to be inconsistent or incorrect!

Once you have verified that all program file dates are correct, and shortcuts have been updated, you will still need to make one more check. Follow the instructions below carefully:
Open C3. Click on the icon to open a case by case number. Enter a case number and click okay. When the screen appears, verify that on the bottom, where the lines of information appear for the case # in question, your data should read in the following order:

PMI#
Active
Active Begin Date
Active End Date
Child’s Name
Birth Date
Age
Gender
Relationship to Child
Health Plan.

If the Age appears in the line BEFORE the Birth Date, you will need to “synch” your database. You will do this by following the steps below:

Locate your C3 Program Files. These will be found either on your hard drive, or on your network drive. If on your hard drive, they will be in Program Files/DHS/Catch3. You should see a “C3SynchDB.exe” file. Double click on this file. Then click the “Synch” button, as shown in the picture below.
You will see the message below, once you’ve completed the synch process.

Now, go back and bring up the same case number you checked previously, and make sure that the order of the information is correct after doing the ‘synch’ process. Birth date should appear BEFORE Age. If it does not, and you have followed the above steps completely, contact Bobbi Post, at 651-431-3098, or Cher Rudolph, at 651-431-3305.

In addition, it is important that you have the necessary up-to-date program files for C3 located in your Update folder. You will find this folder in your CTCData folder. The image below shows the files you SHOULD have in this folder at all times! Please make certain that the Date Modified matches what you have in your files. The dates shown below are the most current dates, and are the correct ones! If you do not have these files in your Update folder, contact either Cher or Bobbi, and they will send them to you.