

This checklist is meant to be a guide for closing out this school year and preparing for next year.
 End of Year Check List 2007/2008 school year summary:

- Finish entering data
- Check your data and correct it
- Export data to Muskie
- Backup database
- New Year Cleanup (bumps students up one grade)
 - Change back any student not going to the next grade
- Remove Graduates (archive graduates)
- Archive (individuals), drop-outs, etc
- Un-register students, if your SBHC registers each year
- Backup database, again before leaving for the school year

It is recommended adding, “Date of last physical exam: _____”, on next year’s registration/update form.

	Finish entering all contacts
	<p>Run “Cleanup Reports” from CF’s Reports/Report Manger On the Custom Criteria tab, make sure the box for <i>“Select records if ANY criteria are TRUE”</i> is checked before running the cleanup reports.</p>
	<ul style="list-style-type: none"> • Report: Missing Registration Data <ul style="list-style-type: none"> ○ Name ○ Grade (Current) – VERIFY with school (drop-out’s, etc) ○ School (Current) ○ Sex (i.e. gender) ○ Race ○ Ethnicity (Hispanic or Non-Hispanic) ○ Insurance Carrier (Primary) ○ Primary Provider <p>- If you register each year the Date Range tab representing registration should be set for the school year 7/1/2007 to 6/30/2008. - If students are only registered once, set the date range for 1/1/1900 (or when your SBHC started registering ongoing) to 6/30/2008.</p>
	<ul style="list-style-type: none"> • Report: Missing Contact Data <ul style="list-style-type: none"> ○ diagnosis codes ○ procedure codes <p>Date Range tab for contacts should be set for the school year 7/1/2007 to 6/30/2008.</p>

	Export data for Muskie
	<p>-Log into CFAdmin; Data Utilities button on the left, then Export button on the right. -A wizard will begin, click next. At the bottom of the next list choose State Files – ME. -Next again, date range is 7/1/2007 to 6/30/2008, TAB format. Next again. -Browse to choose a location to export your file to (some place you will find it again, like your desktop). Click finish. This may take a several minutes.</p>

Export Lesson: <http://muskie.usm.maine.edu/clinicalfusion/LevelIV/ExportInstr6.2008.pdf>

BACK UP YOUR DATABASE TO MORE THAN ONE LOCATION

(just in case something goes wrong)

You may need administrative access if your database is networked.

To make a backup of your database

- Log into Clinical Fusion
- Tools dropdown menu
- Database – Backup, a wizard will begin
- There are two Browse locations. The first defaults to your C/hard drive or the last saved location.
- The second Browse allows you to save in a secondary location at the same time. You may save it to a memory stick or a secure network, etc.
- Click FINISH

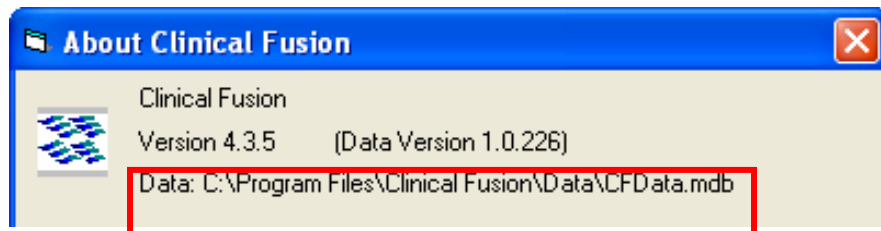
If this does not work, go to the next steps for an alternative back up method.**

** Alternative backup method:

- Go to database location (see instructions below if you don't know where it is)
- Right click on the file **CFData.mdb** and Copy
- Go to where you want to save it i.e. My Documents or a memory stick
- Then Paste the file
- Do the same for the **System.mdw** file

If you do not know where your database is located:

- Open Clinical Fusion
- Go to the Help dropdown menu and choose About Clinical Fusion
- Your database location (file path) comes after "Data:"



If your CF database is networked, you may need Administrative access to backup and do the following.

	<p>TIPS: Turn off screen saver, turn off energy saver, turn off standby (basically turn off anything that could make your computer stop processing as larger databases should take several hours to complete.) Also, do not run any other programs while the following are processing. Perform each in the order provided below.</p> <ol style="list-style-type: none">1. <u>New Year Cleanup</u> (bumps students up a grade, 12th graders become “graduates” – only do this once.)<ul style="list-style-type: none">- Log into CFAdmin, choose Data Utilities on the left, then New Year Cleanup button on the right. A wizard will begin, click next.<ul style="list-style-type: none">- Archive contacts prior to: 7/1/2006 (keep 2 yrs of active data)- Increase grade level if registered prior to: 6/30/2008- Click Next, browse to find the database (CF defaults to your C drive or the last location used). Click Next. It may ask if you want to append to existing file, click ok.- At this point you may need to manually change students who will not pass to the next grade this year.2. <u>Remove Graduates</u> – Archives graduates Log into CFAdmin, choose Data Utilities on the left, then Remove Graduates button on the right. A wizard will begin, click next. Choose “graduate” in the drop down list, then Next. Browse to find the database (CF defaults to your C drive or the last location used). Click Next. It may ask if you want to append to existing file, click ok.3. <u>Archiving a Person</u> – Archives individuals who are no longer in the school Log into CFAdmin, choose Data Utilities on the left, then Archiving a Person on the right. A wizard will begin, click next. Click the select button, a list of active SBHC members appears. Check the box to the left of the individuals to archive, click ok when done checking off names, then next. Browse to find the database (CF defaults to your C drive or the last location used). Click Next. It may ask if you want to append to existing file, click ok.
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	<p>If your SBHC registers each year, open CF, at the search screen begin to double click on names and un-checking the student’s registered checkbox. Lesson: http://muskie.usm.maine.edu/clinicalfusion/LevelI/UnRegistering1.pdf</p>
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Backup your database again, a CD copy is highly recommended. Your school may purge computer systems during the summer.

	<p>If you need further instructions, please contact the Help Desk: taubut@usm.maine.edu or 780-5893</p>
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