

2011/2012 End of SBHC Year Check List
for SBHCs using Clinical Fusion ®

This checklist is meant to be a guide for closing out this school year and preparing for next year. End of Year Check List 2011/2012 school year summary, in order:

- [Finish entering data](#)
- [Run reports to check your data, then correct it as needed](#)
- [Export data to Teen and Young Adult Health \(TYAH\)](#)
- [Backup Clinical Fusion database](#)
- CFAdmin: [New Year Cleanup](#) (bumps students up one grade)
 - Change back any student not going to the next grade
- CFAdmin: [Remove Graduates](#) (archive graduates)
- CFAdmin: [Archive](#) (individuals), drop-outs, etc
- CFAdmin: [Un-register students](#), if your SBHC registers each year
- [Backup database](#) again on CD or memory stick, before leaving for the school year

	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) ○ School (Current) ○ Sex (i.e. gender) ○ Race ○ Ethnicity (Hispanic or Non-Hispanic) ○ Insurance Carrier (Primary) ○ Primary Provider <p>- If you <u>register each year</u> the Date Range tab representing registration should be set for the school year 7/1/2011 to 6/30/2012.</p> <p>- If students are <u>only registered once</u>, set the date range for 1/1/1900 (or when your SBHC started registering ongoing) to 6/30/2012.</p>
	<ul style="list-style-type: none"> • Other useful report(s): <ul style="list-style-type: none"> ○ Missing Contact Data ○ 99420 missing HRA ○ HRA Missing 99420 <p>Date Range tab for contacts should be set for the school year 7/1/2010 to 6/30/2011.</p>

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	<p>Export data file(s) to Teen and Young Adult Health (TYAH)</p> <p>Shannon King, Adolescent Health Coordinator Women's Health Coordinator Maine Ctr. for Disease Control & Prevention Dept. of Health & Human Services Key Plaza 5th Floor 11 State House Station Augusta ME 04333-0011</p> <p>ph: 207-287-4577 e-mail: Shannon.King@maine.gov</p>
	<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 7/1/2011 to 6/30/2012, TAB format. Next again. -Browse to choose a location to export your files 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/Export6.2010.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.

	<p>To make a backup of your database</p> <ul style="list-style-type: none">• 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 <p>If this does not work, go to the next steps for an alternative back up method.**</p>
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	<p>** Alternative backup method:</p> <ul style="list-style-type: none">• Go to database location (CF Help menu, About CF, Data: [location])• 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
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**If your Clinical Fusion database is networked,
you may need Administrative access to perform the following.**

Lesson: http://muskie.usm.maine.edu/clinicalfusion/LevelIII/Lesson_New_Year_Cleanup.pdf

	<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 could 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: 7/1/2010 (keep 2 yrs of active data)- Increase grade level if registered prior to: 6/30/2012- 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, use the following instructions: http://muskie.usm.maine.edu/clinicalfusion/LevelIV/LessonUnRegisterALLStudents.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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