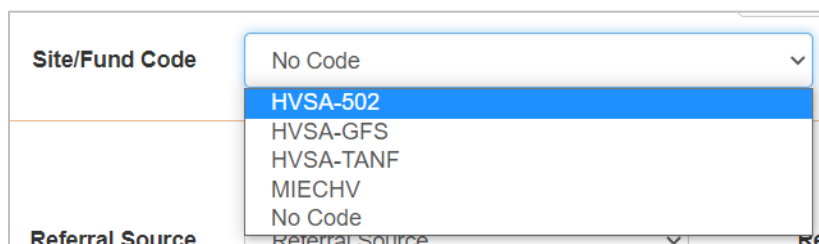


How to document HVSA funding codes in Visit Tracker



Local implementing agencies (LIAs) funded by the HVSA receive funding from one or more sources, including MIECHV, TANF, 502, and GFS. LIAs must assign an HVSA funding code to each family served with HVSA funds when reporting to DOH. General information about funding sources and funding codes is available on the [Data Collection page](#) of the DCYF Home Visiting website.

HVSA programs that use Visit Tracker are assigned each of the four HVSA funding codes shortly after their Visit Tracker account is created: 1) MIECHV, 2) HVSA-502, 3) HVSA-TANF, and 4) HVSA-GFS. In Visit Tracker, these are called "Site/Fund Codes."

Funding codes are first assigned when completing the Enter New Family form using the "Site/Fund Code" field. The drop down menu next to "Site/Fund Code" should include all four HVSA funding codes (programs that receive non-HVSA funds may see additional funding codes in this menu.) If you do not see these four funding codes, please notify DOH by emailing homevisiting@doh.wa.gov.



Once a family is entered into Visit Tracker, you can review and edit their funding history on the Family Data page in the "Family Site/Fund Code History" table.

Family Site/Fund Code History						
Code	Start Date	End Date	Notes	Created	Last Updated	
HVSA-GFS	12/21/2021			12/21/2021	6/1/2022	 

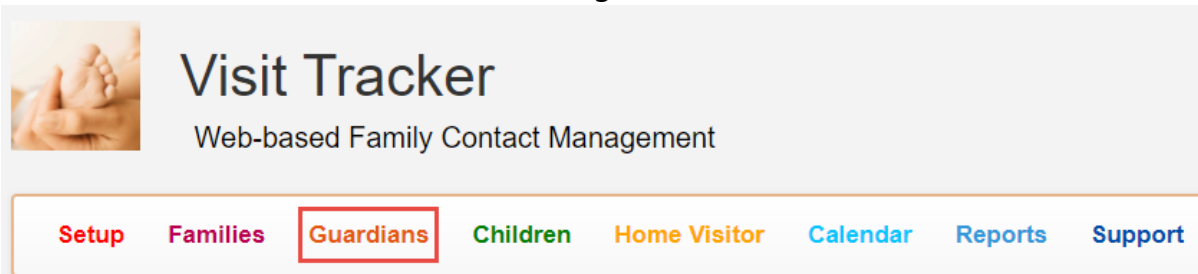
Reminder: In general, the HVSA cautions against editing a family's funding code due to issues in reporting continuity over time. Instructions are provided for cases when a funding code change is absolutely necessary. Funding code changes should be discussed with your DCYF Program Specialist and a DOH home visiting team member before changes are made.

How to Edit a Funding Code in Visit Tracker

Occasionally a family’s funding code needs to be edited or updated. This may be because 1) an incorrect funding code was entered at enrollment, or 2) it’s necessary to reassign a family from one funding code to another (as agreed upon with your DCYF Program Specialist).



1) An incorrect funding code was entered in Visit Tracker

1. Navigate to visittrackerweb.com and log in.
2. Click on “Guardians” in the horizontal navigation bar.



3. Choose the guardian from the drop down menu. If the family has multiple guardians, choose the *primary* guardian.

4. This will lead you to the “Family Data” page. Scroll down to the “Family Site/Fund Code History” table near the bottom of the page, and click on the pencil icon next to the Funding Code that needs to be updated.

Family Site/Fund Code History						
Code	Start Date	End Date	Notes	Created	Last Updated	
HVSA-GFS	12/21/2021			12/21/2021	12/21/2021	 

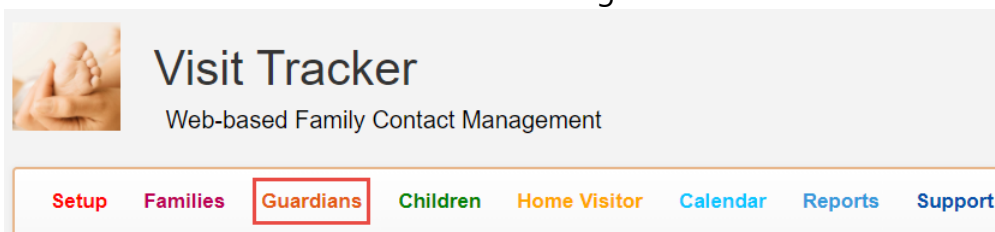
- Choose the correct funding code from the "Current Code" dropdown menu, enter the family's enrollment date as the start date, and click "save."

- The "Family Site/Fund Code History" table will now display the corrected funding code. *In almost all cases, there should only be one row in the Family Site/Fund Code History table.*

Family Site/Fund Code History						
Code	Start Date	End Date	Notes	Created	Last Updated	
MIECHV	12/21/2021			12/21/2021	4/20/2022	

2) It is necessary to move a family from one funding code to another

- Navigate to visittrackerweb.com and log in.
- Click on "Guardians" in the horizontal navigation bar.



- Choose the guardian from the drop down menu. If the family has multiple guardians, choose the *primary* guardian.

- This will lead you to their “Guardian Data” page. Scroll to the Site/Fund Code field and click on the “Add New Code” button.

A screenshot of a web form showing a field labeled "Site/Fund Code" with the value "HVSA-GFS". To the right of the field is a blue button with white text that says "Add New Code". The button is highlighted with a red rectangular border.

- Choose the new funding code from the dropdown menu, enter the Start Date (the actual date of the funding code change), and click “save.” **Do not select “use same date as family latest enroll date.”** This will cause overlapping funding periods and reporting issues.

A screenshot of a dialog box titled "New Site/Fund Code". It contains the following fields:

- Current Code:** HVSA-GFS
- New Code:** A dropdown menu with "HVSA-TANF" selected.
- Start Date:** A date input field with a calendar icon.
- A link below the Start Date field that says "use same date as family latest Enroll date".
- Notes:** A text area for entering notes.
- At the bottom right, there are two buttons: "Save" (orange) and "Cancel" (white).

- Scroll down to the bottom of the page to the “Family Site/Fund Code History” table to see the updated history. **Confirm that the Start Date of the new funding code entry is not the same as the Start Date of the previous funding code entry.**

Family Site/Fund Code History						
Code	Start Date	End Date	Notes	Created	Last Updated	
HVSA-TANF	04/18/2022			4/20/2022		
HVSA-GFS	12/21/2021	04/17/2022		12/21/2021	4/20/2022	

Please reach out to homevisiting@doh.wa.gov with any questions about entering or editing funding codes in Visit Tracker.

Please reach out to your DCYF Program Specialist or homevisiting@dcyf.wa.gov for guidance on whether or not a family’s funding code should be changed.