

26 Steps

WIHV Staffing Data Entry Workflow Guide

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CPPR Tech To Practice

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- 1 Go to the DAISEY homepage at <https://daisey.cete.us/>
Login using your existing DAISEY username and password.

- 2 For Staffing Data Entry, select the option with the grantee name listed TWICE before your user role. If you see a choice corresponding to your organization in which you enter client-level HV data, that is NOT the correct choice for staffing data entry.

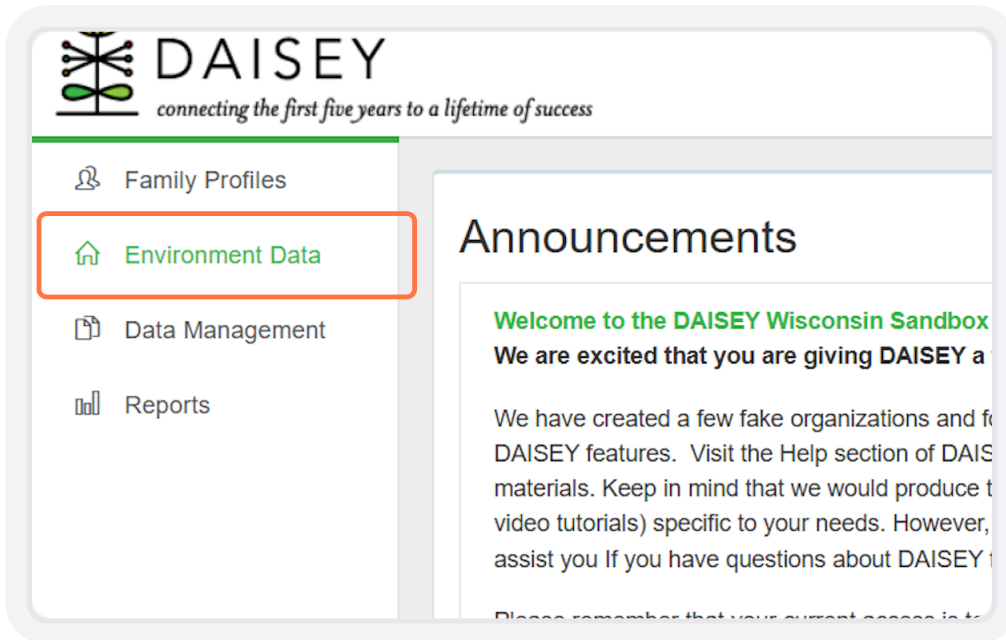
This means if you see:

WIHV | Grantee Name | Grantee Name | Program Admin

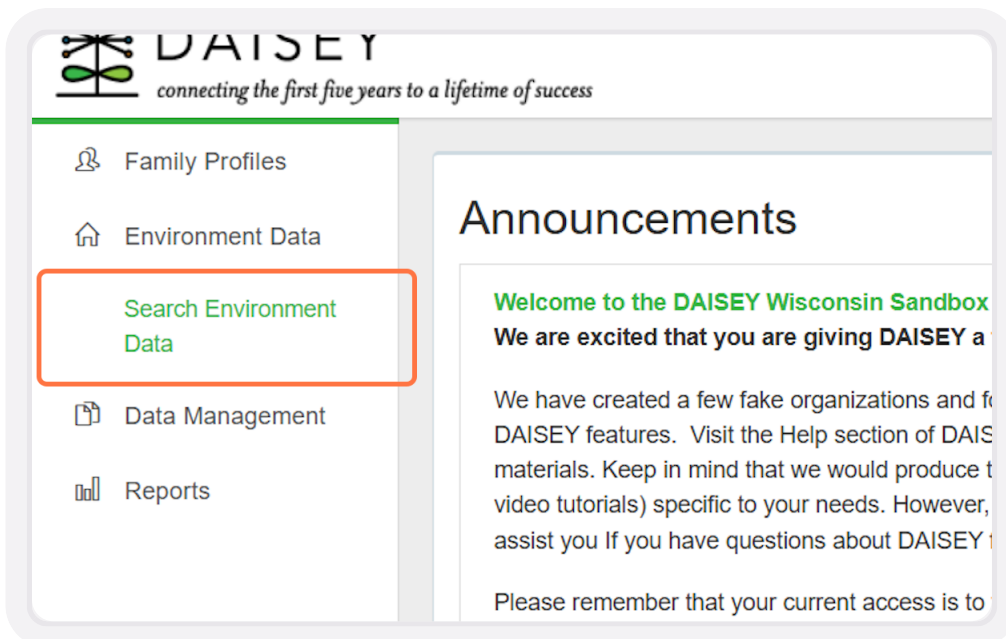
WIHV | Grantee Name | Organization Name | Program Admin

Select the top option.

- 3 From the homepage, click on Environment Data:

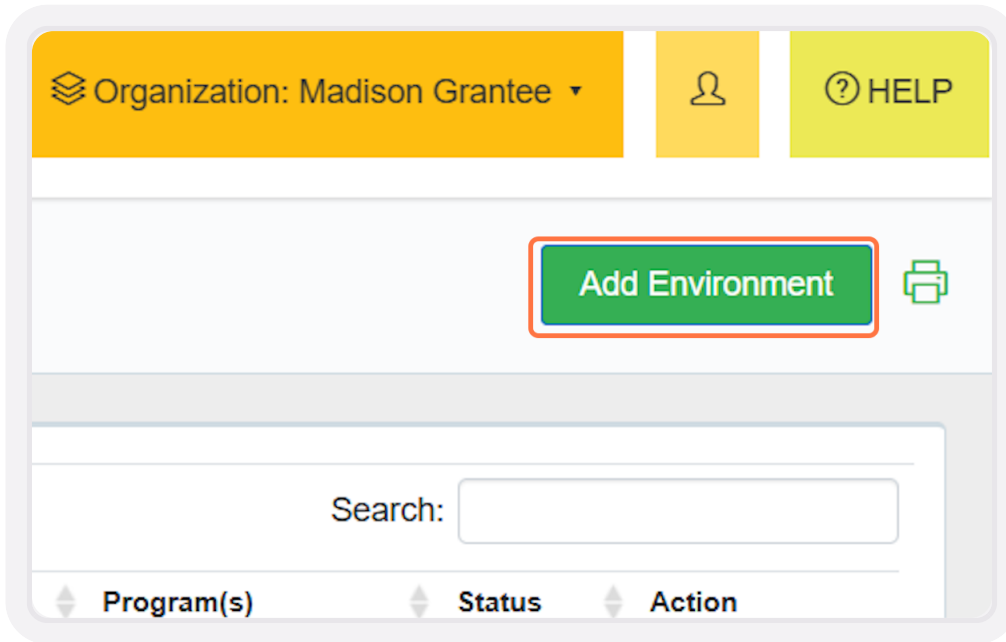


- 4 Click on Search Environment Data



5

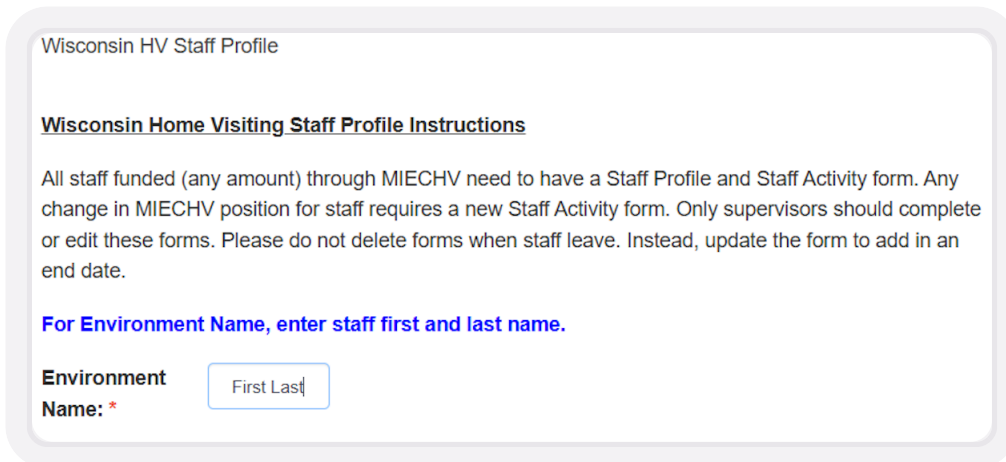
Always check to make sure you haven't already created a profile before adding a new one. To add a new staff profile, click on Add Environment (upper right from the search environment grid):



The screenshot shows the top navigation bar with 'Organization: Madison Grantee' and a 'HELP' button. Below this is a search bar and a table with columns 'Program(s)', 'Status', and 'Action'. A green 'Add Environment' button is highlighted with a red border in the upper right area of the search results.

6

In the field for "Environment Name" type the full name of the staff member:



The screenshot shows the 'Wisconsin HV Staff Profile' form. It includes a section for 'Wisconsin Home Visiting Staff Profile Instructions' and a form field for 'Environment Name' with a red asterisk indicating it is required. The field contains the text 'First Last'.

- 7 Indicate whether this employee is a DAISEY Champion:

Environment
Name: *

Home Visitor Na

Is this employee
a DAISEY
Champion? *

No

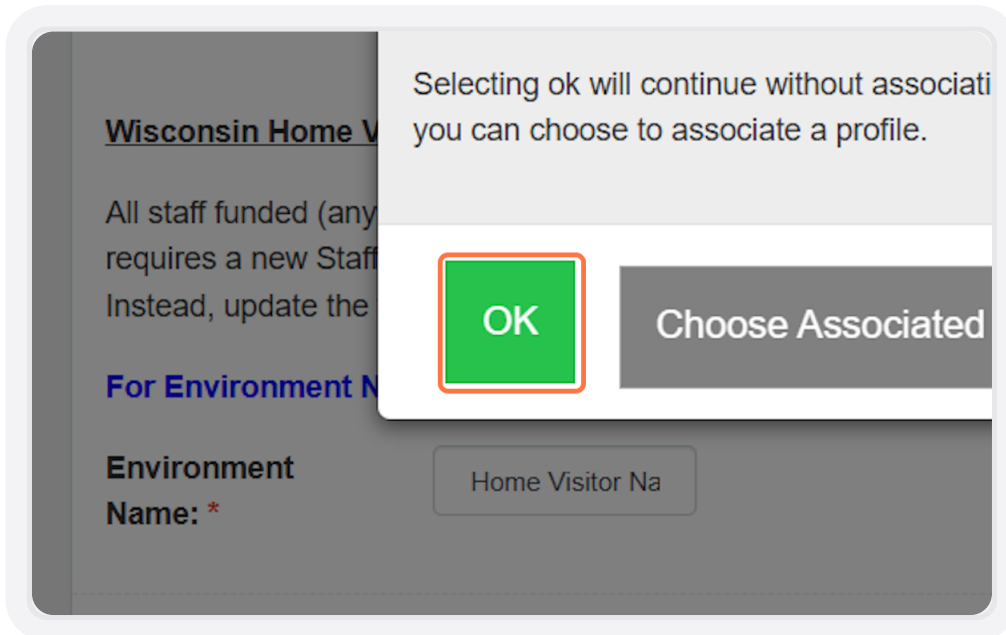
- 8 Click on Save

After clicking the green **Save** button, a

Save

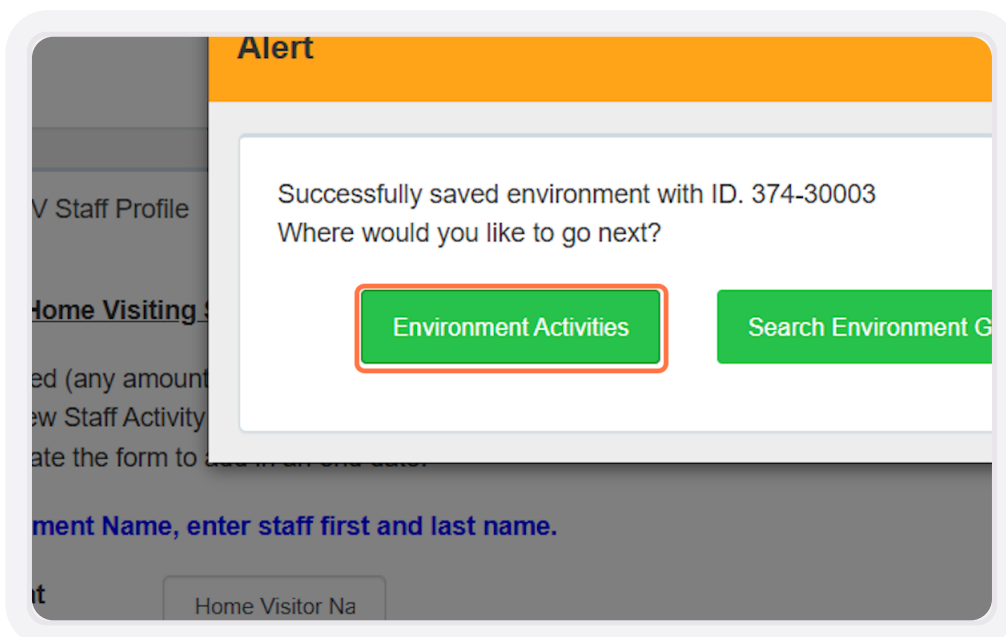
Associated Children

- There is no need to associate child profiles with this staff profile, so simply click "OK":

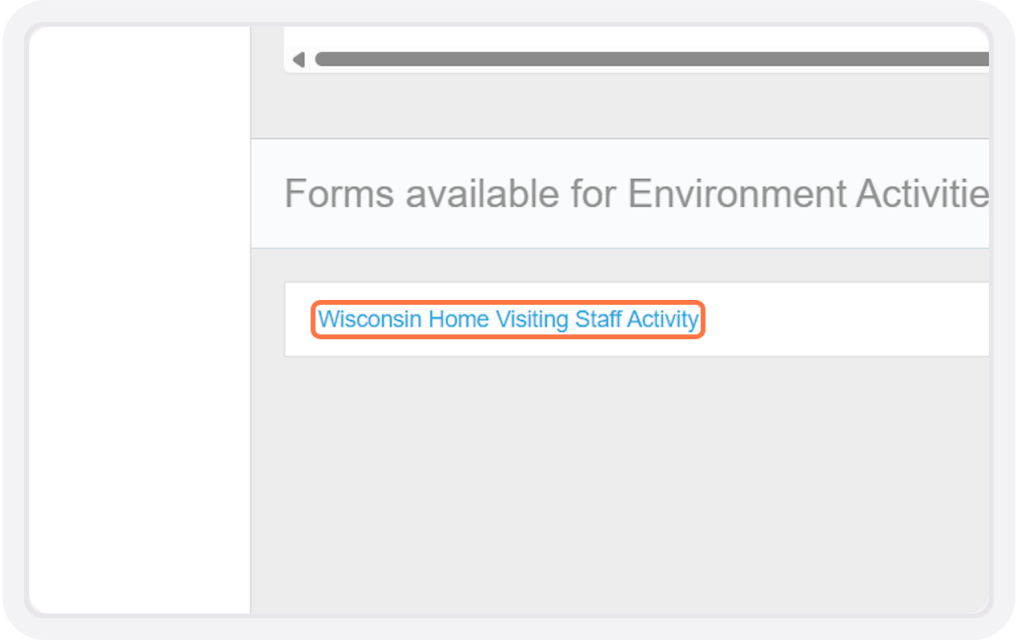


- Now you're ready to enter the position information for this staff! Click on Environment Activities for the next step.

Note that just like with your client-level DAISEY data, you can re-enter any staff's activities page by clicking the Name or ID of the staff profile from your Search Environment grid.



- 11 On the Environment Activities page, click on Wisconsin Home Visiting Staff Activity:



- 12 Enter today's date on the Date of Activity field:

A screenshot of a web form titled "Wisconsin HV Staff Activity". The form has a header bar with the title. Below the header, there are two main sections. The first section contains the "Date of Activity *" field, which has a date picker open showing "January 2026". The date "14" is highlighted in yellow. To the right of the date field is the "Environment ID:" field. The second section contains the "Organization Name" field. The date picker shows a calendar grid for January 2026, with days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates (1-31). The date "14" is highlighted in yellow.

13 Select the organization this staff is affiliated with:

Wisconsin HV Staff Activity

Date of Activity *

01/14/2026

Environment ID:

Organization Name

Bad River HI

Wisconsin HV Staff Activity

14 Indicate the staff's start date at their current position:

Wisconsin HV Staff Activity

Position Start Date *

mm/dd/yyyy

«

January 2026

»

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24

Position End Date

Planned caseload capacity (# of families) *

- 15 Indicate all FFHV position categories for this staff:

FFHV Position Category *

2 Selected ▼

☐ **Check all/ Uncheck all**

☒ Home Visitor

☒ HV Supervisor

☐ Other

- 16 Indicate this staff's planned caseload capacity:

If you are unsure when initially entering this form, enter a placeholder value of "1"

Position Start Date *

01/01/2026

Position End Date

Planned caseload capacity (# of families) *

5

Additional comments ⓘ

- 17 For each of the FFHV positions indicated for this staff, indicate how much of an FTE they are in that position.

The total for all positions should not be greater than 1.

FFHV Home Visitor FTE

Home Visitor FTE
(decimal form)

.75

FFHV HV Supervisor FTE

- 18 Click on Calculate - this should match your expected value for how much of a FTE workload this staff has:

Total FTE

FTE for all positions should not be greater than 1.0.

Total FTE

##

Calculate

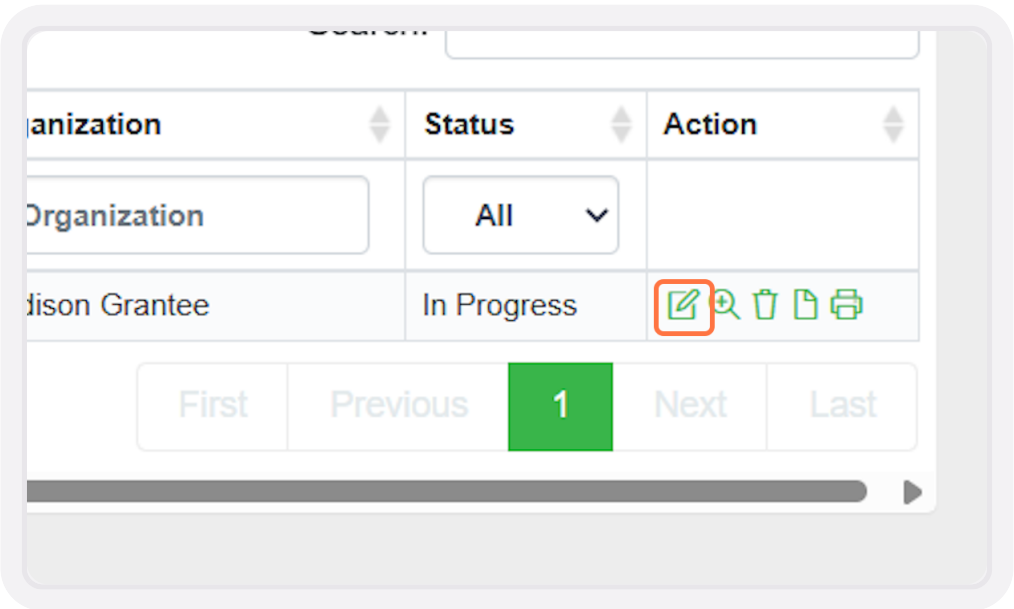
Reason for Position Ending

- 19 Once the form is complete, click "Save":

By clicking "Save" the form will be listed in the staff's environment activities page as "In Progress", meaning you can still edit the form. This is so when this staff's position changes and/ or they leave FFHV you can add a the date of that change and list the reason.

A screenshot of a web form titled "Reason for position ending". The form has a text input field for the reason. Below the input field are two buttons: an orange "Save" button and a green "Submit" button. At the bottom of the form, there is a copyright notice: "© 2026 University of Kansas".

- 20 If this staff's position changes (they switch roles or the percentage of their time in a particular role for FFHV), you must first indicate the end of their current position on the form by clicking the "Edit Form" icon:

A screenshot of a web application showing a table of staff. The table has three columns: "Organization", "Status", and "Action". The first row shows "Organization" with a dropdown menu set to "All". The second row shows "Madison Grantee" with a status of "In Progress". The "Action" column for the "In Progress" row contains several icons, with the first icon (a pencil) highlighted by a red box. Below the table is a pagination bar with buttons for "First", "Previous", "1", "Next", and "Last". The "1" button is highlighted in green.

21 Indicate the date this position ended:

Position End Date

mm/dd/yyyy

« January 2026 »

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17

FFHV Position Category *

22 Indicate the reason for this position ending:

Reason for Position Ending

Complete "reason for position ending" any time an employee's MIECHV position is updated. Please remember to notify the [DAISEY helpdesk](#), and copy the state Home Visiting Data Coordinator when an employee leaves, so their account can be deactivated in DAISEY.

Reason for position ending

Accepted an

23 Once this form is complete, you can now click Submit:



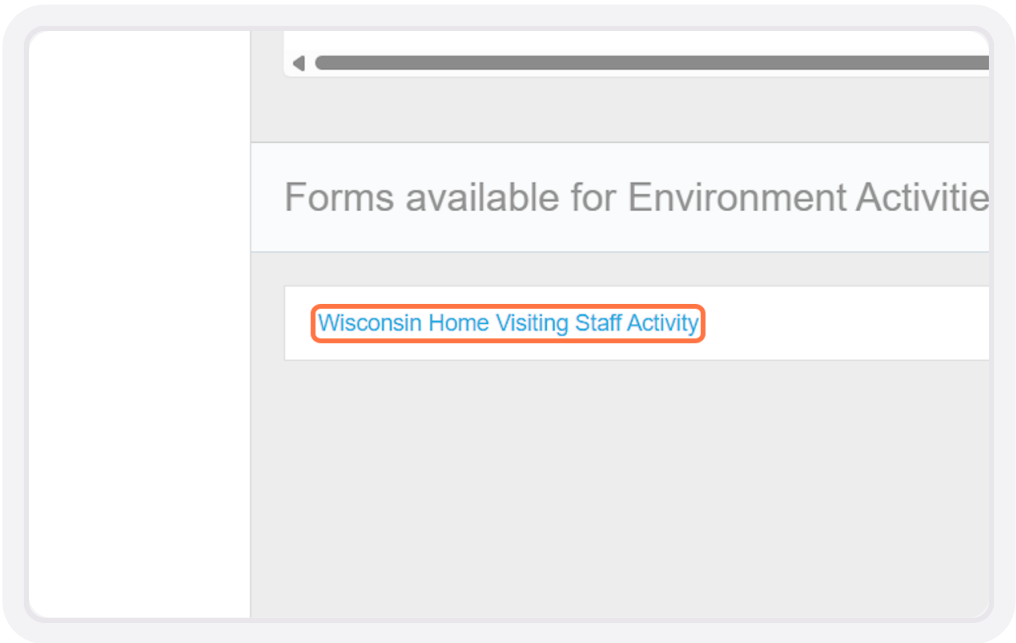
helpdesk, and copy the state Home Visiting Data Coord

Reason for position ending Accepted an ▾

Save Submit

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24 If the staff changed positions, you will need to complete a new Wisconsin Home Visiting Staff Activity form with the information on their current role/ FFHV position at your site:



Forms available for Environment Activities

Wisconsin Home Visiting Staff Activity

25

Remember: Each staff at your affiliated FFHV organizations should have one staff profile, and at least one Wisconsin Home Visiting Staff Activity form completed indicating their role.

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Any questions? Contact BOTH the DAISEY WIHV Helpdesk at daisey.wihv@ku.edu AND your FFHV Data Coordinator, and our teams will be happy to help!