Home Visit Attendance (Home Visiting Program) – ChildPlus Instructions

Document home visit attendance under Family Services tab. Events tab. Add Event. Select Home Visit.

When to create the Home Visit Event

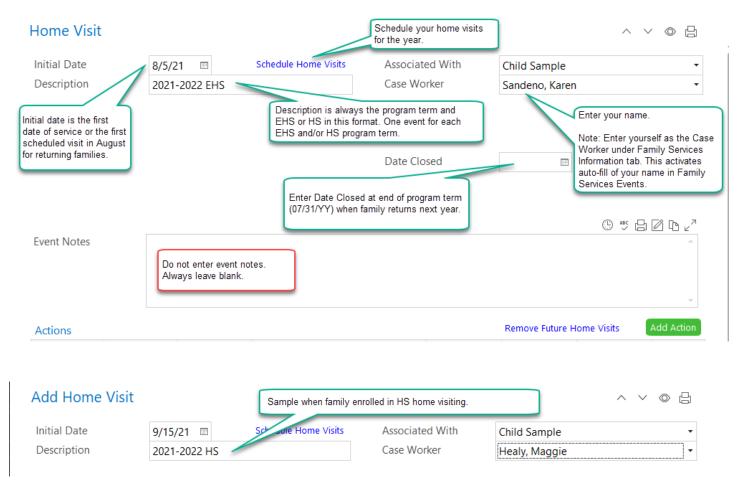When the first home visit is scheduled (first date of service):
- Create the Home Visit Event.
- Schedule your home visits for the program term (Actions).
- Create one Home Visit Event each program term.
- If the family is enrolled in EHS Home Visiting and HS Home Visiting during the same program term, create one Home Visit Event for EHS and one Home Visit Event for HS.

When a family continues enrollment next program term:
- Create the Home Visit Event as of the first home visit scheduled in August.
- Schedule home visits for next program term. Start the counter at 1.
- Close the Home Visit Event from previous program term.

Data Entry for Home Visit Event:
- Initial Date = date when first home visit is scheduled (first date of service) or the first scheduled home visit in August for returning families.
- Description = enter program term and EHS or HS in this format: 2021-2022 EHS or 2021-2022 HS.
- Closed Date = enter last day of the program term for returning families (7/31/YY). Then create a Home Visit Event for the new program term.
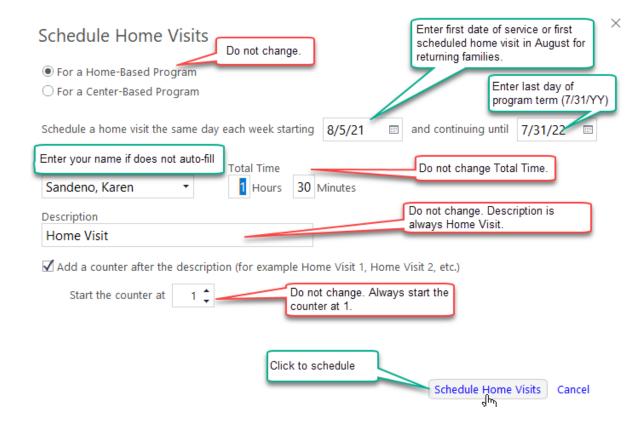
Home Visit

Initial Date	8/5/21
Description	2021-2022 EHS

Schedule your home visits for the year.

Schedule Home Visits

Associated With — Child Sample
Case Worker — Sandeno, Karen

Initial date is the first date of service or the first scheduled visit in August for returning families.

Description is always the program term and EHS or HS in this format. One event for each EHS and/or HS program term.

Enter your name.

Note: Enter yourself as the Case Worker under Family Services Information tab. This activates auto-fill of your name in Family Services Events.

Date Closed

Enter Date Closed at end of program term (07/31/YY) when family returns next year.

Event Notes

Do not enter event notes. Always leave blank.

Actions   Remove Future Home Visits   Add Action

Add Home Visit

Sample when family enrolled in HS home visiting.

Initial Date	9/15/21
Description	2021-2022 HS

Schedule Home Visits

Associated With — Child Sample
Case Worker — Healy, Maggie

| | Application | Enrollment | Family Services | Health | Immunizations | Disability | Mental Health | Birth | Transportation | Education | Fees | Attendance | PIR |

| Events | Family Outcomes | Family Services Information |

Sample of Family Services Events list when a family enrolled in EHS Home Visiting and HS Home Visiting during the same program term.

Family Services Events   Options   Add Event

Date	Event	Description	Associated With	Progress	Time	Case Worker	Actions
10/01/21	Socialization	2021-2022 HS	Family		0 h 0 m	Healy, Maggie	0
9/15/21	Home Visit	2021-2022 HS	Child Sample		0 h 0 m	Healy, Maggie	0
8/15/21	Socialization	2021-2022 EHS	Family		0 h 0 m	Sandeno, Karen	1
8/05/21	Home Visit	2021-2022 EHS	Child		7 h 30 m	Sandeno, Karen	52
8/05/21	Routine Contact	2021-2022	Family		0 h 6 m	Sandeno, Karen	4
7/15/21	Communication Log		Child		0 h 0 m	Sandeno, Karen	3

Scheduling Home Visits for the Program Term

Click Schedule Home Visits (see screen shot above). The following data entry box opens.

- Schedule a home visit the same day each week starting = First date of service or first scheduled home visit in August for returning families.
- Continuing until = last day of program term (7/31/YY).
- Click Schedule Home Visits.

Schedule Home Visits

Do not change.

● For a Home-Based Program
○ For a Center-Based Program

Enter first date of service or first scheduled home visit in August for returning families.

Schedule a home visit the same day each week starting 8/5/21   and continuing until 7/31/22

Enter last day of program term (7/31/YY)

Enter your name if does not auto-fill

Sandeno, Karen ▼

Total Time
1 Hours   30 Minutes

Do not change Total Time.

Description
Home Visit

Do not change. Description is always Home Visit.

☑ Add a counter after the description (for example Home Visit 1, Home Visit 2, etc.)

Start the counter at   1 ▲▼

Do not change. Always start the counter at 1.

Click to schedule

Schedule Home Visits   Cancel

When you click Schedule Home Visits, the scheduled home visits will list under Actions (click in the Scheduled column header to sort most recent first).

The scheduled home visits are placeholders for each week, not necessarily the actual date of the home visit (Action Date).

Every home visit must be documented (Action Date, Status, and Action Notes). Click on the home visit to open the action box and document the home visit.

Home Visit

Initial Date	8/5/21	Schedule Home Visits	Associated With	Child Sample
Description	2021-2022 EHS		Case Worker	Sandeno, Karen

Date Closed

The scheduled home visits will list under Actions (click in the Scheduled column header to sort most recent first).

The scheduled home visits are placeholders for each week, not necessarily the actual date of the home visit (Action Date).

Every home visit must have a documented outcome (Action Date, Status, and Action Notes). Click on the home visit to open the action box and document outcome.

Event Notes

Actions

Remove Future Home Visits   Add Action

Scheduled	Action Date	Action Type	Description	Status	Case Worker	Referred To	Time
8/5/2021	8/5/2021	Direct	Home Visit 1	Action Complet...	Sandeno, Karen		1h 30m
8/12/2021	8/10/2021	Direct	Home Visit 2	Family Cancelled	Sandeno, Karen		1h 30m
8/19/2021	8/19/2021	Direct	Home Visit 3	Family Cancelled	Sandeno, Karen		1h 30m
8/26/2021	8/26/2021	Direct	Home Visit 4	Action Complet...	Sandeno, Karen		1h 30m
9/2/2021	8/31/2021	Direct	Home Visit 5	Staff Cancelled	Sandeno, Karen		1h 30m

General Information about Documenting Home Visit Attendance

- Every home visit must have a documented action (attendance record).
- Open the Scheduled Home Visit Action that you are documenting. Data entry screen opens. See samples below.
- Action Date is the date when the status of the home visit is determined. See Home Visit Attendance flow chart.
- Action Completed Status is used when:
  - visit completed as scheduled
  - family accepts reschedule offer and visit is completed
- Family Cancelled Status is used when:
  - family accepts reschedule offer, then cancels or no show
  - family does not accept reschedule offer
  - unable to offer reschedule within the week
- Staff Cancelled Status is used when:
  - family accepts reschedule offer, then cancels or no show
  - family does not accept reschedule offer
  - unable to offer reschedule within the week
  - program cancelled

Direct scheduled for 9/9/21

Action Date is the date when status of the home visit is determined.

Action Type	Direct
Scheduled	9/9/21
Action Date	

Type of Contact	Home Visit
Description	Home Visit 6
Status	
Case Worker	
Total Time	

Action Completed
Awaiting Feedback
Family Cancelled
No Show
Ongoing
Partially Completed
Refused
Staff Cancelled

Action Notes

Always Click Clock before typing an action note.

When Family Cancelled or Staff Cancelled, must document:
-- the reason for cancellation and
-- the specific reschedule offerings and reason reschedule not accepted or not possible.

See samples below.

Only the highlighted status options are used for home visits.

Action Completed used when
-- visit completed as scheduled
-- family accepts reschedule offer and visit is completed

Family Cancelled used when
-- family accepts reschedule offer, then cancels or no show
-- family does not accept reschedule offer
-- unable to offer reschedule within the week

Staff Cancelled used when
-- family accepts reschedule offer, then cancels or no show
-- family does not accept reschedule offer
-- unable to offer reschedule within the week
-- program cancelled

Sample Completed Home Visit

- Action Date = the date home visit was completed.
- Status = Action Completed.
- Update Description = After the home visit number, add details about the type of home visit. If in person, include the location of the in person home visit. See screen shots on the next page.
- Case Worker = enter your name if not auto-filled.
- Action Notes require use of the quick note named HVCO. After you Click the Clock, type hvco <enter>. The following text auto fills to your action note. Data enter your notes after each home visit topic. Type NA if the home visit topic was not discussed at the visit.

> Who was at the visit?
> Family Check In:
> Parent-Child Interactions/Activity:
> Parenting Topic:
> Health and Family Well Being:
> Goal Check In:
> Play and Learn:
> Next Home Visit Date and Plan:

Reminder: the first eight (8) home visits with each new family are PAT Foundational Visits. Make sure action notes document the specific PAT Foundational Visit that was completed.

Direct - 8/5/21

> Sample of Completed Home Visit. Type hvco <enter> to auto-fill home visit topics. Then, document the home visit. Type NA after topics not discussed at the visit. Details on progress or follow up to an event must be documented under that event such as ILP, Family Goal, etc.

Action Type	Direct		Type of Contact	Home Visit
Scheduled	8/5/21		Description	Home Visit 1
Action Date	8/5/21		Status	Action Completed
			Case Worker	Sandeno, Karen
			Total Time	1 Hours 30 Minutes

Action Notes

8/5/2021 3:23 PM   Karen Sandeno
Who was at the visit? Mom, dad, child
Family Check In: Dad shared he is enjoying his new job. Mom shared taking child to spray park was fun.
Parent-Child Interactions/Activity: Dad read book with child, family played with ball on floor. Child rolled ball

Delete Action

8/5/2021 3:23 PM   Karen Sandeno
Who was at the visit? Mom, dad, child
Family Check In: Dad shared he is enjoying his new job. Mom shared taking child to spray park was fun.
Parent-Child Interactions/Activity: Dad read book with child, family played with ball on floor. Child rolled ball back and forth, laughing.
Parenting Topic: Transition to table foods-mom states worry about how much to feed child and that they are throwing their food lately. Discussed strategies for helping with food throwing. Mom states practicing using a cup and fork means more clean-up for parents and that child likes the cup.
Health and Family Well-Being: Offered Nutrition Referral, WCX scheduled for next week. Discussed Dental Exam and providers. Parents state they will make an appointment.
Goal Check In: Parents want to move. Will develop goal at next visit.
Play and Learn: Reminded parents of play and learn next week, Thursday 2pm. Mom and child should be able to attend.
Next Home Visit Date and Plan: 8/12 at 11am. Work on family goal, f/u on dental appointment, check on how WCX went.

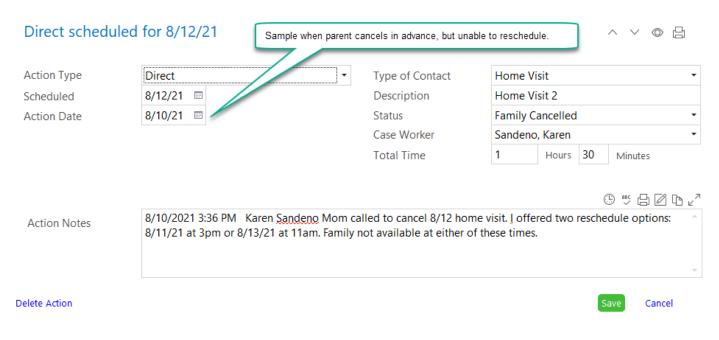## Sample of Adding Details to Description – updated instructions 2/9/22

After the home visit number, add details about the type of home visit. If the home visit is completed in person, include the location of the in person home visit.

Direct scheduled for 1/3/22

Action Type	Direct		Type of Contact	Home Visit
Scheduled	1/3/22		Description	Home Visit 1 - Type details here
Action Date	1/5/22		Status	Action Completed
			Case Worker	Sandeno, Karen

1 Hours 30 Minutes

After the home visit number, type details about where/how the home visit occured:
* Zoom
* Phone
* In person and where (home, library, park, etc)

See examples below.

Action Notes

Actions

Remove Future Home Visits   Add Action

Scheduled ▲	Action Date	Action Type	Description	Status	Case Worker	Referred To	Time
1/3/2022	1/5/2022	Direct	Home Visit 1 - In person home	Action Comple...	Sandeno, Karen		1h 30m
1/10/2022	1/12/2022	Direct	Home Visit 2 - phone	Action Comple...	Sandeno, Karen		1h 30m
1/17/2022	1/19/2022	Direct	Home Visit 3 - in person library	Action Comple...	Sandeno, Karen		1h 30m
1/24/2022	1/26/2022	Direct	Home Visit 4 - zoom	Action Comple...	Sandeno, Karen		1h 30m
1/31/2022	2/2/2022	Direct	Home Visit 5 - in person park	Action Comple...	Sandeno, Karen		1h 30m

Save and Add Another   Save   Cancel Add

Samples of Family Cancelled Home Visits

This sample is when a parent cancels and declines the offer to reschedule.

Direct scheduled for 8/12/21

> Sample when parent cancels in advance, but unable to reschedule.

Action Type	Direct	Type of Contact	Home Visit	
Scheduled	8/12/21	Description	Home Visit 2	
Action Date	8/10/21	Status	Family Cancelled	
		Case Worker	Sandeno, Karen	
		Total Time	1 Hours	30 Minutes

Action Notes: 8/10/2021 3:36 PM   Karen Sandeno Mom called to cancel 8/12 home visit. I offered two reschedule options: 8/11/21 at 3pm or 8/13/21 at 11am. Family not available at either of these times.

Delete Action   Save   Cancel

This sample is when a parent is a no show, with Action Notes documenting the required follow up.

Direct - 8/19/21

> Sample of no show and required follow up.
> Action Date is the date Family Cancelled status was determined.

Action Type	Direct	Type of Contact	Home Visit	
Scheduled	8/19/21	Description	Home Visit 3	
Action Date	8/20/21	Status	Family Cancelled	
		Case Worker	Sandeno, Karen	
		Total Time	1 Hours	30 Minutes

Action Notes: 8/20/2021 5:00 PM   Karen Sandeno Have not heard from parent. Called and spoke with parent. Family is okay. There was no opening to reschedule for this week. We confirmed regular day and time for next week's visit.
8/19/2021 3:39 PM   Karen Sandeno No one answered the door for today's home visit. Sent text to parent to get in touch with me tomorrow.

Delete Action   Save   Cancel

Sample of Staff Cancelled Home Visit

This sample is when staff cancels and was unable to offer reschedule options during the week.

Direct - 8/31/21

Action Type	Direct
Scheduled	9/2/21
Action Date	8/31/21

Sample of staff cancellation, unable to reschedule

Type of Contact	Home Visit
Description	Home Visit 5
Status	Staff Cancelled
Case Worker	Sandeno, Karen
Total Time	1 Hours 30 Minutes

Action Notes

8/31/2021 3:48 PM Karen Sandeno Sent text to parent to cancel the 9/2/21 home visit. There is a required staff training. Unable to offer a reschedule during this week.

Delete Action   Save   Cancel

How to Remove Future Home Visits (optional)

When a participant exits the program, you have the option to remove the home visits scheduled after the drop date.
- Click Remove Future Home Visits.
- Enter the drop date in the data entry screen.
- Click Remove Scheduled Home Visits.

Actions

Remove Future Home Visits   Add Action

Scheduled	Action Date	Action Type	Description	Status	Case Worker	Referred To	Time
7/28/2022		Direct	Home Visit 52		Sandeno, Karen		1h 30m
7/21/2022		Direct	Home Visit 51		Sandeno, Karen		1h 30m
7/14/2022		Direct	Home Visit 50		Sandeno, Karen		1h 30m

Remove Future Home Visits

This screen allows you to remove scheduled home visits, usually because the child dropped. It will not remove any home visits that have an Action Date.

Remove all scheduled home visits that have a Scheduled Date on or after

Remove Scheduled Home Visits   Cancel