

Documenting Depression Screenings, Referrals, and Follow Up in Visit Tracker

Depression Screening:

What are we measuring?



HVSA Aligned Measure 2: Percent of primary caregivers enrolled in home visiting who are screened for depression using a validated tool within 3 months of delivery if enrolled pregnant or 3 months of enrollment if enrolled postnatally.

Instructions:

Complete a depression screening for primary caregivers using the PHQ-9 form within **3 months of delivery** if enrolled pregnant or **3 months of enrollment** if enrolled postnatally.

How do I enter a depression screening into Visit Tracker?

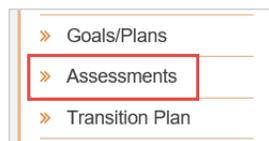
Step 1: Log into Visit Tracker and click on the “Guardians” link in the horizontal menu at the top of the page.



Step 2: Choose the guardian that was screened from the drop-down menu on the Guardian Data page.



Step 3: Click on the “Assessments” link in the menu on the left side of the screen.



Step 4: From the Assessment page, click on the “+” button in the orange Assessments bar. A drop down menu will appear.



Step 5: Choose PHQ-9 from the drop down menu. (If you don't see the PHQ-9 option, contact your program's Visit Tracker administrator to update the Assessments settings in the Setup section.)



Step 6: Fill out the PHQ-9 form with the guardian's responses. Make sure to enter the date that the screening was completed, not the data entry date. Click create.

Personal Health Questionnaire (PHQ-9)

Date: 05/15/2020 Measurement Tool: PHQ-9

Family Name: Caregiver Family ID: 951543

Guardian: [Dropdown]

Guardian ID: [Dropdown]

Home Visitor: Home Visitor Next Due Date: 05/15/2021

Family declined assessment

Are you currently receiving mental health services/counseling? Yes No Declined to answer Not asked

	Not at all	Several days	More than half the days	Nearly every day	Not Answered
1 Little interest or pleasure in doing things	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
2 Feeling down, depressed or hopeless	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
3 Trouble falling or staying asleep, or sleeping too much	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
4 Feeling tired or having little energy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
5 Poor appetite or overeating	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
6 Feeling bad about yourself - or that you are a failure or have let yourself or your family down	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
7 Trouble concentrating on things, such as reading the newspaper or watching television	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
8 Moving or speaking so slowly that other people could have noticed. Or the opposite - being so fidgety or restless that you have been moving a lot more than usual	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
9 Thoughts that you would be better off dead, or of hurting yourself	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Subtotals: 0 0 0

PHQ-9: 0

*** Referral Instructions:**
If the answer to question #9 is other than "Not at all", or the total score = 10 or higher, a referral is needed.
Once the referral is made, record in the Resource Connections section as "Mental Health Services".

	Not difficult at all	Somewhat difficult	Very difficult	Extremely difficult	Not Answered
10 If you checked off any problems, how difficult have these problems made it for you to do your work, take care of things at home, or get along with other people?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Resource Connection

Was a resource connection made as a result of a concern found during this assessment? Yes No

Create Cancel Print Report

Completed Depression Referrals:

What are we measuring?



MIECHV Performance Measure 17: Percent of primary caregivers referred to services for a positive screen for depression who receive one or more service contacts.

Instructions: If the total PHQ-9 score is 10 or higher or the caregiver answered something other than “not at all” to question 9, the depression screening is positive and a referral is needed. The referral is considered complete when the caregiver receives one or more service contacts as indicated by a documented follow up.

How do I document a depression referral in Visit Tracker?

There are three routes to documenting a depression referral in Visit Tracker.

Option 1 is to enter a resource connection straight from the PHQ-9 form by clicking “Yes” after the question “Was a resource connection made as a result of a concern found during this assessment?”

Resource Connection

Was a resource connection made as a result of a concern found during this assessment? Yes No

Create Cancel [Print Report](#)

Option 2 is to enter a resource connection while completing a Personal Visit Record (PVR).

Option 2 – Step 1: Choose the guardian from the drop-down menu on the Guardian Data page.

Guardian Data ↑↓ Select Guardian

Option 2 – Step 2: Click on the “Contact” link in the menu on the left side of the screen.



Option 2 – Step 3: Within the list of Contacts, click on “Private” next to the visit date when the screening occurred. This will open the PVR form.

Date	Type	Home Visitor	Children	Total	0-3	>3	Pre
10/4/2018	Private	Home Visitor2	Bornchild Caregiver	1	1	0	Y  

Option 2 – Step 4: Find the Resource Connections section of the PVR, and click on the “+Add” button.

Resource Connections

Were resource connections set or reviewed during this visit? Yes No

Current Family Resource Connections 

Option 3 is to enter a referral from the Resource Connections page.

Option 3 – Step 1: Choose the guardian from the drop-down menu on the Guardian Data page.

Guardian Data  



Option 3 – Step 2: Click on the “Resource Connection” in the menu on the left side of the screen.



Option 3 – Step 3: Click the “+” button in the orange Resource Connection bar.



Each of these routes will take you to the Resource Connection form:

1. Complete the Resource Connection form. Be sure to enter the date the referral was made (not the date the form is being completed) and choose "Mental Health Services" as the Connection Type.

Resource Connection

Connection Date: 03/15/2020 This is the date first discussed.

Pertains to: Select please

Referral from assessment?: No Yes Assessment Date: [Calendar icon]

Referrals resulting from a child screening should be recorded on the child's screening record in the Child Screenings section.

Connection Type: Mental Health Services

Connected By: Home Visitor

Connected To: [Text field]

Connection Reason: [Text area]

Did the family verbally accept this connection?: Y N N/A

Comments: [Text area]

Connection is: Progressing (will show on PVRs) Completed (will no longer show on PVR)

Create Cancel

How do I document a completed referral in Visit Tracker?

1. Choose the guardian from the drop-down menu on the Guardian Data page.

Guardian Data [Up/Down arrow icon] Select Guardian [Dropdown arrow icon]

2. Navigate to the Resource Connections page via the menu on the left side of the screen.

- > Family Home
- > Demographic/Health
- > Contacts
- > Resource Connection

3. Find the existing referral in the Family Resource Connections table and click the pencil icon to open the Resource Connection form.

Date	Connection Type	Connected To	Current Status	Status as of...	Latest Progress Note	Complete?	
10/12/2021	Mental Health ...	Mental Health Services	First discussed	10/12/2021		N	[Pencil icon]

- In the "Resource Connection – Status History" section at the bottom of the form, click "+Add new status."

Resource Connection - Status History			
Follow Up Date	Is family receiving services?	As of ...	Progress Note
10/12/2021	First discussed	10/12/2021	

- Enter the date you followed up with the caregiver, and choose "Yes, received services" from the "Status – receiving services?" drop down menu.

The screenshot shows the 'New Status' form with the following fields:

- Date followed up with family:** 03/15/2022
- Status - receiving services?:** A dropdown menu is open, showing options: "Yes, received services" (highlighted with a red box), "No - Waitlist", "No - Services not available in community", "No - Family already receiving services", "No - Family has not contacted connection agency", "No - Family refused connection", "No - Family did not qualify / not eligible", "No - Family attempted contact", and "No - Family made contact".
- As of:** (Empty field)
- Progress Notes:** (Empty text area)
- Buttons:** "Create" (highlighted with a red box) and "Cancel".

- Enter the date the caregiver received services and click "Create."

The screenshot shows the 'New Status' form with the following fields:

- Date followed up with family:** 03/15/2022
- Status - receiving services?:** Yes, received services
- As of:** (Empty field, highlighted with a red box)
- Progress Notes:** (Empty text area)
- Buttons:** "Create" (highlighted with a red box) and "Cancel".

How do I document that a caregiver is already receiving mental health services in Visit Tracker?

There are 2 options for documenting that a caregiver is already receiving services.

Option 1 is to enter this information directly on the PHQ-9 form.

1. Choose "Yes" after the question "Are you currently receiving mental health services/counseling. An additional field will appear asking for the "as of" month. Enter the month when you asked the caregiver if they were already receiving services.



Are you currently receiving mental health services/counseling? Yes No Declined to answer Not asked

If "Yes", as of 03/2022

Option 2 is to "Add a new status" to the Resource Connection via the Resource Connections page.

2. Choose the guardian from the drop-down menu on the Guardian Data page.



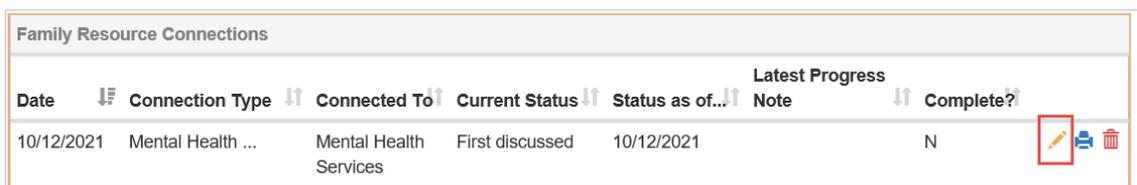
Guardian Data ↑↓ Select Guardian

3. Navigate to the Resource Connections page via the menu on the left side of the screen.



- » Family Home
- » Demographic/Health
- » Contacts
- » Resource Connection

4. Find the existing referral in the Family Resource Connections table and click the pencil icon to open the Resource Connection form.



Family Resource Connections						
Date	Connection Type	Connected To	Current Status	Status as of...	Latest Progress Note	Complete?
10/12/2021	Mental Health ...	Mental Health Services	First discussed	10/12/2021		N

5. In the "Resource Connection – Status History" section at the bottom of the form, click "+Add new status."

Resource Connection - Status History			
Follow Up Date	Is family receiving services?	As of ...	Progress Note
10/12/2021	First discussed	10/12/2021	

- Enter the date you followed up with the caregiver, and choose "No – Family already receiving services" from the "Status – receiving services?" drop down menu.

The screenshot shows a 'New Status' form with the following fields:

- Date followed up with family:** 03/15/2022
- Status - receiving services?:** A dropdown menu is open, showing options:
 - Select Service Result
 - Yes, received services
 - No - Waitlist
 - No - Services not available in community
 - No - Family already receiving services** (highlighted with a red box)
 - No - Family has not contacted connection agency
 - No - Family refused connection
 - No - Family did not qualify / not eligible
 - No - Family attempted contact
 - No - Family made contact
- As of:** (empty field)
- Progress Notes:** (empty text area)
- Buttons:** Create (highlighted with a red box), Cancel

- Enter the date the caregiver told you they were already receiving services (likely the same date you followed up with the family), and click "Create."

The screenshot shows the 'New Status' form with the following fields:

- As of:** (empty date field, highlighted with a red box)
- Progress Notes:** (empty text area)
- Buttons:** Create (highlighted with a red box), Cancel