

How to Document Visits and Encounters in Visit Tracker (ESSS, PAT, & STEEP)

This document includes instructions for Early Steps to School Success (ESSS), Parents as Teachers (PAT), and Steps to Effective Enjoyable Parenting (STEEP) programs. Family Spirit programs should refer to an alternate document specific to their model's Session Summary form. This document is available on the [Data Collection page](#) of DCYF's Home Visiting Services Account web page.

How to document a home visit

Documenting a home visit requires two actions. The first is to schedule the visit using the Family Contacts form. The second is to complete a Personal Visit Record (PVR).

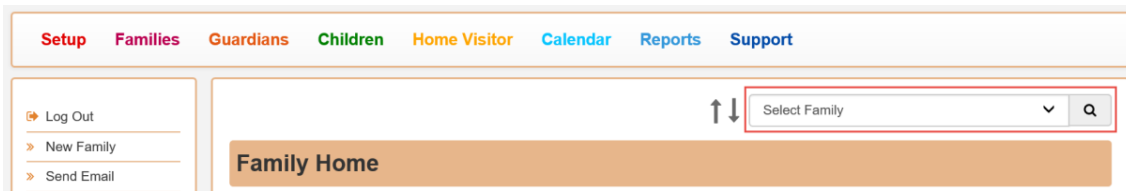


Contacts Form

Includes initial questions about the visit, including:

- Contact Type
- Contact Date
- Contact Duration

1. Click on the *Families* link in the horizontal navigation bar, and choose the family from the drop down menu.



2. In the left vertical menu, click on "Contacts" under *Family Home*.



3. Click on the "+" sign in the Family Contacts header.



4. An "Add Contact" menu will pop up. Data elements required by the HVSA are outlined in red. The contact type **must** be set to "Private" to indicate that the contact is a home visit.

You may complete the Add Contact form before the visit occurs. After the visit, you must return to the Contacts page and complete a Personal Visit Record (PVR). **A PVR must be completed in order to indicate that the visit actually occurred.**

Personal Visit Record

Includes questions about the visit, including:


- Visit Duration
- Visit Type

These are the minimum data elements on the PVR that are required by the HVSA. PAT LIAs must complete additional fields to meet model requirements.

1. To complete a PVR, return to the family's "Contacts" page.



2. The visit you previously scheduled will appear in the "Contacts" table on this page. Click on the word "Private" in the "Type" column to open the PVR form.

| Contacts | | | | | | | | | |
|-----------|---------|--------------|-------------------|------------|-------|-----|----|-----|---|
| Date | Type | Home Visitor | Guardians | Children | Total | 0-3 | >3 | Pre | |
| 4/10/2020 | Private | Home Visitor | Primary Caregiver | Born Child | 2 | 2 | 0 | Y |    |

3. Confirm that the **duration** value accurately reflects the actual length of the visit. If the visit was shorter or longer than expected, you may update the duration here.

Duration:

4. Choose the **location** of the visit. Home, Affiliate site, Community site, Foster Home, and Outdoors locations are categorized as "In-Person" by the HVSA. Video Conference and Telecommunication are categorized as "Virtual Visits."

Location:

Guardians:

Present:

If guardian is pregnant, # weeks

Check in before visit?

- Home
- Affiliate site
- Community site
- Video Conference
- Telecommunication
- Foster Home
- Outdoors

5. There are many other questions on the PVR, and most apply to PAT programs. If you are a PAT program, fill out the rest of the questions that are required by your model.
6. When finished, click "Save Visit Record" at the bottom of the page.

The PVR also includes data entry locations for the following:

- Breastfeeding survey (used for Aligned Measure 1: Breastfeeding)
- Child medical visits (used for Aligned Measure 3: Well-Child Visits and the *MIECHV-only* Child Injury measure)
- Guardian medical visits (*MIECHV only* - used for MIECHV Postpartum Care measure)
- Tobacco use survey (*MIECHV only* – used for MIECHV Tobacco Cessation Referrals measure)
- A family member read, told stories, and/or sang songs every day during the past week? (used for Aligned Measure 6: Early Language and Literacy Activities)
- Developmental screening (used for Aligned Measure 7: Developmental Screening)
- Any concerns regarding your child's development, learning, and/or behavior? (*MIECHV only* - used for MIECHV Behavioral Concerns measure)
- Depression referrals (used for Depression Referrals performance payment measure and the MIECHV Completed Depression Referrals measure)

Other tips related to home visits and PVRs



You may use the last question on the PVR, "Visit & Write Up Completed?," to create a visual queue for whether or not a PVR has been completed in the "Contacts" table.

If no is chosen, the "Private" link in the Contacts table on the Family Contacts page will be red. If yes is chosen, the "Private" link will be green. If no PVR has been created, the "Private" link will be blue.

| Contacts | | | | | | | | | | | |
|-----------|---------|--------------|----------------|--------------------------------|-------|-----|----|-----|--|--|--|
| Date | Type | H | No PVR created | Children | Total | 0-3 | >3 | Pre | | | |
| 5/26/2022 | Private | FamSpirit HV | First Last | Twin A Toddler Child n B | 3 | 3 | 0 | | | | |
| 5/25/2022 | Private | FamSpirit HV | First Last | Toddler Child | 1 | 1 | 0 | | | | |
| 5/24/2022 | Private | FamSpirit HV | First Last | Twin A Toddler Child n B | 3 | 3 | 0 | | | | |

How to cancel a home visit

1. If a planned visit does not occur, you may indicate that by editing the "contact." Find the row for the contact you want to edit, and click the pencil icon near the right side of the row.




| | | | | | | | | | | | |
|-----------|---------|--------------|-------------------|--------------|---|---|---|---|---|---|---|
| 7/26/2020 | Private | Home Visitor | Primary Caregiver | Unborn Child | 1 | 1 | 0 | Y |  |  |  |
|-----------|---------|--------------|-------------------|--------------|---|---|---|---|---|---|---|

2. In the "Edit Contact" menu, expand the drop down list next to "Contact Type," and choose the reason the visit did not occur. The options are "No Show," "Cancelled by Program," "Cancelled by Parent," or "Cancelled by Parent Home Visitor."

| | |
|-----------------------|----------------------------------|
| Contact Type | Private |
| Date | Private |
| Duration | Phone |
| Home Visitor | Text |
| lect Guardians | Email |
| | Other |
| | No Show |
| | Cancelled By Program |
| | Cancelled by Parent |
| | Cancelled by Parent Home Visitor |

3. Click Save.

The change will be reflected in the "Contacts" table on the Family Contacts page.

| | | | | | | | | | | |
|----------|---------------------|--------------|-------------------|------------|---|---|---|---|---|---|
| 7/2/2020 | Cancelled by Parent | Home Visitor | Primary Caregiver | Born Child | 1 | 1 | 0 |  |  |  |
|----------|---------------------|--------------|-------------------|------------|---|---|---|---|---|---|

How to document an encounter

During the covid-19 pandemic, the HVSA is using encounters to determine whether a family was engaged during a specified period of time. Encounters are documented in 2 ways depending on the encounter type.

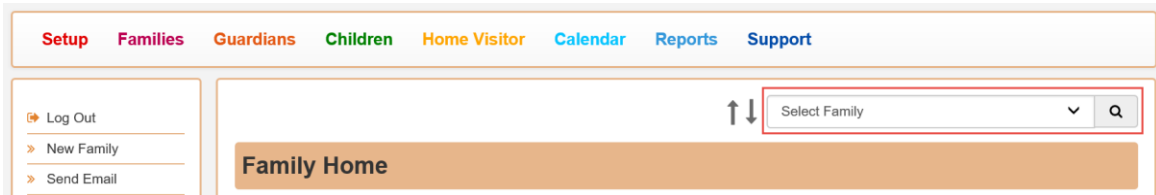
If you are documenting a phone call, text, e-mail, or "other" type of contact (e.g. porch drop off), use the **Contacts form**. If you are documenting a family's participation in a group connection, use the **Group Connections form**.

Phone calls, texts, e-mails, or other

Contacts Form

- Contact Type
- Contact Date
- Contact Duration

1. Navigate to the Family Home page by clicking on the “Families” link in the horizontal navigation bar and choosing the family from the drop down menu.



2. Click on “Contacts” in the left vertical navigation bar.



3. Click on the “+” sign in the Family Contacts header.



- An "Add Contact" menu will pop up. Data elements required by the HVSA are outlined in red. To document an encounter, the contact type must be set to "phone," "text," "email" or "other." Enter the Contact Type, Date, and Duration, then click "Create."

The screenshot shows the "Add Contact" form with the following fields and values:

- Contact Type:** Phone (highlighted in red)
- Date:** 09/20/2021 (highlighted in red)
- Duration:** 10 minutes (highlighted in red)
- Time:** 1:00 PM
- Home Visitor:** Home Visitor
- Select Guardians:** Caregiver, Primary (Primary), Caregiver, Additional, SeperateHousehold, AdditionalCaregiver
- Select Children:** Child, Born (Active), Child, Unborn (Active)
- Location:** Location
- Recurring Event?:** No Yes
- Notes:** (empty text area)

Buttons: Create, Cancel

Group Connections

Documenting a group connection requires two steps. The first step is to schedule the group connection using the Add Group Contact form. The second is to complete a Group Connection report.

**Schedule the Group Connection
using the Add Group Contact
Form**



**Document the Group
Connection using the Group
Connections Attendance Form**

Add Group Contact Form

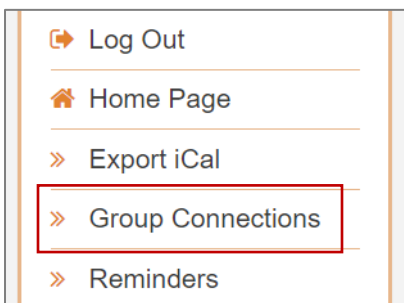
Includes initial questions about the visit, including:

- Group Connection Date
- Group Connection Duration

1. Navigate to the Calendar page by clicking on the "Calendar" link in the horizontal navigation bar.



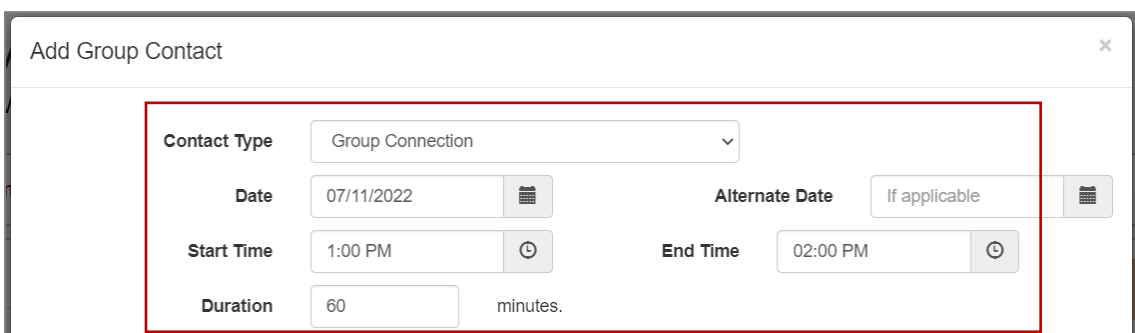
2. Click on Group Connections in the vertical navigation bar on the left side of the page.



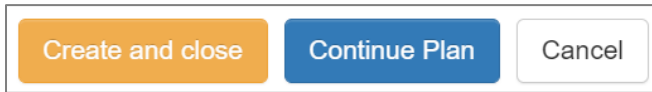
3. Click the + sign in the Group Connections header.



4. Fill in the date, the start time and the end time. The duration field will automatically populate with the number of minutes based on the start and end times.

A screenshot of the 'Add Group Contact' form. The form is titled 'Add Group Contact' and has a close button (X) in the top right corner. The form contains several fields: 'Contact Type' (Group Connection), 'Date' (07/11/2022), 'Alternate Date' (If applicable), 'Start Time' (1:00 PM), 'End Time' (02:00 PM), and 'Duration' (60 minutes). A red box highlights the 'Contact Type', 'Date', 'Start Time', 'End Time', and 'Duration' fields.

5. Fill in the rest of the form as applicable, and click “Create and Close.” Parents as Teachers programs may need to click “Continue Plan” to complete additional fields and then click “Create and close.”



Group Connections Attendance Form

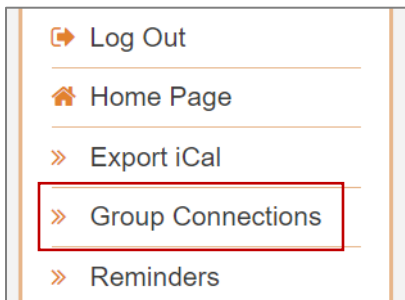
Includes initial questions about the visit, including:

- Group Connection Date
- Group Connection Duration

6. After the group connection has occurred, return to the calendar page by clicking on the “Calendar” link in the horizontal navigation bar.



7. Click on Group Connections in the vertical navigation bar on the left side of the page.



8. Select a date range that includes the date of the Group Connection you want to document and click “Display Group Connections.”

A form for selecting a date range. It starts with the text 'Please select a date range to display:'. There are two date input fields: the first contains '07/01/2021' and the second contains '07/11/2022'. Each field has a calendar icon to its right. Below the date fields is an orange button labeled 'Display Group Connections' and a white button labeled 'Clear filter'.

9. Click on the "Attendance" link next to the Group Connection you want to document.

| Date | Time | Meeting Description | Plan | Attendance | Record | | |
|-----------|---------|---------------------|------|------------|--------|--|--|
| 7/11/2022 | 1:00 PM | | | | | | |

10. Check the boxes next to the families that attended the Group Connection.

Group Connections Attendance

INCLUDE: Active Always Included | Wait List | Mailing Only | Recruit | Inactive / On Hold

| | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|

*Alphabetized by Family Name

Anderson

- Anderson, Neo (Primary)
- Smith, Lindsey
- Anderson, Sandy
- Anderson, Prenatal

blaze

- blaze, blade (Primary)
- blade, crusher

bobby smith

- smith, jane (Primary)
- smith, bobby

family

- family, adams (Primary)
- family, adams jr
- family, candy

last

- last, name (Primary)

martinez

- martinez, maria (Primary)
- martinez, annalecia

11. Click "Save and Close."

Save and Close

Cancel

Parents as Teachers programs may also need to complete a Group Connections Record to meet model requirements.

Because Visit Tracker makes frequent improvements, some information in this document may be out-of-date. If you have questions about documenting visits and encounters, or you find that areas within this document need to be updated, please reach out to homevisiting@doh.wa.gov.