

HOME VISITING COMMUNITY OF PRACTICE

February 23, 2017



Agenda

- Welcome & Introductions
- Documentation
- Data Entry
- Quick Reminders
- Q&A
- Thank you!



DOCUMENTATION

Client Records

- Records should include a copy of all correspondence made with the family or about the family (emails, letters, etc.)
- A copy of any screening, assessment or plan created with the family must be in the file and entered in the data system timely.
- Records should reflect that clients have been informed of their rights in the program and know where/how to file a grievance – all consents, releases or forms signed by the family should be included and notes should demonstrate efforts to explain each form and right to revoke consent at any time.
- Home visitors should take steps to ensure that documentation in records is accurate, free from opinion and reflects the services provided.
- All records should include adequate and timely documentation to facilitate service delivery and ensure staff made all efforts to complete necessary referrals, screenings and assessments.
- Documentation should protect clients' rights and privacy to the extent that is possible and appropriate.
- Providers should store records following the family's exit of the program to ensure reasonable future access. Records should be maintained for no less than 6 years post exit.

Documentation | WHAT

Ohio's Early Childhood Home Visiting program defines a case note as a written narrative of communications, visits and activities completed with a family/child by the assigned home visitor.

Case notes should **always** include:

- Date/time activity occurred (not date/time of note completion)
- Type or place of contact (face-to-face, home visit, phone call, etc.)
- “NOP” narrative format
- Author's signature and credentials (LSW, RN, HV, etc.)

Documentation | WHY

- There are many reasons case noting is beneficial in home visiting:
 - *Helps HV stay organized and remember items needing follow-up*
 - *When agency is audited, reviewer can look at case notes for a detailed description of activities that took place and referrals that were made*
 - *During staff turn-over, the next home visitor can easily look through case notes and pick up where last home visitor left off*
 - *Up-to-date case notes can easily be pulled in case home visitor is ever subpoenaed by the court*

Documentation | Text Messages

- ODH does not encourage the use of text messaging as a form of communication between home visitor and client.
- Each home visiting provider must decide whether they will prohibit or allow the use of text messaging.
- Agencies choosing to allow texting should develop a local level policy that establishes guidance and addresses security risks and procedural safeguards, such as:
 - *Client consent forms – informing family of potential costs, security risks, allowable content, schedule, etc.*
 - *Storing & destroying messages – documenting in client record*
 - *Security/HIPPA Considerations – identify allowable devices (agency owned phone, personal, computer application), password protected*
 - *Permissible content/establishing boundaries*

Documentation | WHEN



Text Message

- Summary of text exchange or screenshot printed and placed in file



Phone Call

- Summary of call and type (voicemail, outgoing, incoming)



Mail/E-mail

- Copy of letter mailed and/or emails exchanged



Home Visit

- Notes, Observation, Plan (NOP)

Case notes should be completed for **any correspondences with the family **and** regarding the family (i.e. communicating with other family members or other providers working with the family)*

Documentation | HOW



Notes – State the facts: time/date, location, participants, tools/assessments completed, statements from family



Observation – Share things you observed: note red flags on screenings, unusual behavior, parent-child interaction



Plan – Create next steps: referrals made or declined/offered, education or materials planned for next visit, the next visit time/date

**NOP case noting format may not always be applicable when documenting emails or phone calls. If the case note is only to state a brief activity that occurred regarding the family, just document your “notes”.*

Documentation | WHERE

 Ohio Help Me Grow Case Notes

Child's Name: Sample Case Note Date of Birth: 1/17/17

Early Track ID: 0000000000

Date	Narrative	Signature
2/13/17	<p>2:06pm - Home Visitor (HV) Kristin Canady received phone call from mom. Mom asked if HV could help mom connect with a therapist to address some of her postpartum concerns. HV asked if she wanted a Mental Health Counselor (MHC) to come to the home or if she wanted to see a psychiatrist in an office setting. Mom stated she would like a MHC. HV asked if there was anywhere she wished to be referred to. Mom stated she had no preferences. HV explained ABC's Mental Health Counseling program and she stated she was interested. HV stated she would need a release of information (ROI) signed by mom in order to make referral. Mom stated okay and stated HV could stop by at 2:30pm to get ROI signed.</p> <p>2:30pm - HV went to family home and got ROI signed for ABC's Mental Health Counseling. HV called ABC (555-555-5555) and referred mom to program. Mom thanked HV and reminded mom of their next scheduled home visit for 2/15/17 @ 1:00pm. Mom stated she looks forward to it.</p>	

Home Visitors may
handwrite/type case
note onto a paper
form. The document
below can be found on
www.helpmegrow.ohio.gov
and is form HEA
8023

Documentation | WHERE

Home Visitors may also enter case notes directly into Early Track Data System

Home

- Contact Log
- Demographics
- Caregivers
- Referrals
- Early Intervention +
- Home Visiting +
- Exit Child
- Case Notes**
- Transfer Child
- History

Case Note List Case Note Detail

Case Note Date: 2/13/2017 2:05:14 PM

*Case Note Type: Home Visitor

*Case Note Subject: Mental Health Referral

Created By: Kristin Canady

*Narrative:

2:06pm - Home Visitor (HV) received phone call from mom. Mom asked if HV could help mom connect with a therapist to address some of her postpartum concerns. HV asked if she wanted a Mental Health Counselor (MHC) to come to the home or if she wanted to see a psychiatrist in an office setting. Mom stated she would like a MHC. HV asked if there was anywhere she wished to be referred to. Mom stated she had no preferences. HV explained ABC's Mental Health Counseling program and she stated she was interested. HV stated she would need a release of information (ROI) signed by mom in order to make referral. Mom stated okay and stated HV could stop by at 2:30pm to get ROI signed.

2:30pm - HV went to family home and got ROI signed for ABC's Mental Health Counseling. HV called ABC (555-555-5555) and referred mom to program. Mom thanked HV and reminded mom of their next scheduled home visit for 2/15/17 @ 1:00pm. Mom stated she looks forward to it.

Save

* Indicates required field.

Case Note List Case Note Detail

Click 'New' to add a new case note or select an existing note to edit.

	Case Note Date	Created By	Case Note Type	Case Note Subject	Narrative
	2/13/2017	Canady, Kristin	Home Visitor	Mental Health Ref...	2:06pm - Home Vis...

Documentation | Case Note Etiquette

- Case notes should be written in complete sentences with proper grammar.
- If you are going to use initialisms and/or acronyms in your narrative, remember: the first time you use an initialism/acronym, the words should be written out with the short form placed in parentheses immediately after.
 - i.e. Home Visitor (HV) or Ohio Department of Health (ODH)
- Documentation should be easy for any person to read and comprehend (parent, judge, doctor, etc.)
- All narratives should be written in 3rd person and refer to all individuals by title (HV, mom, doctor, maternal grandmother, etc.) Sentences with “she”, “his”, “their” etc. may confuse reader.



Documentation | Connecting the dots...

- Anyone reviewing a client record should be able to read the file like a book!
- There should be a case note that aligns with every document in the client record:
 - *The reviewer should be able to match a screening completed in the file with a case note summarizing the date it was administered, home visit and results.*
- Case notes should expand on screening/assessment results:
 - *If a concern was identified on any tool, home visitors should review results with family and offer a referral to an appropriate program.*
 - *Case notes should include the referral options presented to the family and if the family declined or accepted referral.*
 - *If family signs ROI and accepts referral, document the contact information for referral source and the detail of how the referral was made (fax, phone call, etc.). Make sure to follow-up on referral and document referral outcome.*
- There should be no gaps in time-lines:
 - *If a case note states the next visit was scheduled for 2/23/17 but the following case note is a visit that took place on 3/1/17; what happened in between? Did the family cancel? Did home visitor reschedule? Always document all communications!*



DATA ENTRY



Data Entry | Why it matters...

- Entering all of the required information for families enrolled in home visiting (tools, scores, referrals, notes, demographics, goals, etc.) may not be the most exciting part of your job but it helps inform everything we do:
 - *Reports generated by a data management system (i.e. Early Track) can be used to inform policy, planning and practice decisions.*
 - *Helps identify trends in communities and methods for improvement.*
 - *Drives continuous quality improvement.*
 - *Provides easy tracking for referrals and service delivery.*
 - *Promotes best practice and evidence-based model fidelity.*
 - *Provides quantitative data that help demonstrate effectiveness of home visiting*

Data Entry | Areas for improvement:

- Ensuring the accuracy of data being entered into our state-wide data system is key to our success! In order to improve the quality of data being entered, we must identify common data entry and collection errors. Recently, we have seen an increase in the number of data deletion requests and claims adjustments forms from local staff. Common data entry mistakes:
 - *Entering a home visit in the wrong child record.*
 - *Saving a home visit without entering administered screening/tools scores.*
 - *Billing and submitting for home visits missing these scores.*
 - *Entering incorrect dates/times of visits, tools, family plans, etc.*
 - *The data in the client record does not match the data entered into Early Track.*
 - *Not updating family contact information (address/phone number) timely.*
 - *Overlapping claims (date/time of event conflicts with other events submitted – i.e. a home visit time overlaps with travel time entered.*

Data Entry | Tips & Techniques

- Open only one child record at a time:
 - *Entering home visits for 2 different child records at the same time may cause error in saving data or entering data for the wrong child.*
- Never begin entering home visit detail if you will not have time to enter tools/scoring or family plan data immediately after.
- Review dates/times entered are correct before saving.
- Use a time/activity form to help stay organized.
- Program consultants and ETDS will begin tracking and monitoring agencies that continue to submit frequent deletion requests.
- Providers that are still entering data incorrectly will receive a site visit to review files and provide TA/training to improve performance.

Data Entry | Adjustment Request Forms

- HMG HV Adjustment Request Form is used to make changes or delete event claims that have already been submitted for billing. We are seeing many forms submitted do not include all information required or is filled out incorrectly.
- In order for consultants to quickly process these requests, below are some tips when filling out this form:
 - *A voucher ID is needed and can be found by running the Home Visiting Claim Events report*
 - *Home visit deletion requests must always include all activities associated with that home visit (documentation/data entry/prep/referral time, family plan, screenings/tools, etc.)*
 - *Supervisor must sign form and fill-in each field*
- An adjustment form is **not** needed for visits that were submitted without tool scores.
 - *Supervisors should email program consultant information on the home visit needing corrected with each tools scoring that needs to be entered exactly how it would be entered in ET. Consultants can forward scores onto the IT team to enter instead of deleting and re-entering entire visit.*

Data Entry | Sample of an incorrect request:

Child Information				Contractor Information					
ET ID*: Click here to enter text.				Home Visiting Contractor*: Click here to enter text.					
Child's name*: Baby Smith				Home Visitor Agency*: Ohio County Agency HMG					
Child's DOB/Due Date (circle) *: 3/1/2017				Home Visitor*: Carrie Jackson					
Parent's name*: Click here to enter text.				Contract Manager Name*: Click here to enter text.					
Contract Manger E-mail*: Click here to enter text.				Contract Manager Signature*: _____					
Home Visit Date*	Event Date*	Voucher ID*	Event Type*	Previously Approved Start Time*	Previously Approved End Time*	Requested Start Time Adjustment**	Requested End Time Adjustment**	Previously Approved Rate*	Requested Rate Adjustment**
10/11/2016	10/11/2016		Home Visit					\$12.00	0.00

Data Entry | Sample of a correct request:

Child Information

ET ID*: 0012345678

Child's name*: Baby Smith

Child's DOB/Due Date (circle)*: 3/1/2017

Parent's name*: Jessie Smith

Contract Manger E-mail*: ContractManager@OHHMG.COM

Home Visiting Contractor*: Ohio County Health Dept.

Home Visitor Agency*: Ohio County Agency HMG

Home Visitor*: Carrie Jackson

Contract Manager Name*: Cindy Logan

Contract Manager Signature*:
Cindy Logan

Contractor Information

Home Visit Date*	Event Date*	Voucher ID*	Event Type*	Previously Approved Start Time*	Previously Approved End Time*	Requested Start Time Adjustment**	Requested End Time Adjustment**	Previously Approved Rate*	Requested Rate Adjustment**
01/11/2017	01/11/2017	17B1026	Home Visit	1:00 PM	1:45 PM	0:00	0:00	\$12.00	0.00
01/11/2017	1/11/2014	17B1026	Preparation	8:25 AM	8:40 AM	0:00	0:00	\$11.50	0.00
1/11/2017	1/11/2017	17B1026	ISEL	1:29 PM	1:34 PM	0:00	0:00	\$3.83	0.00
1/11/2017	1/11/2017	17B1026	PSI	1:35 PM	1:45PM	0:00	0:00	\$7.67	0.00

Home Visit Date*	Event Date*	Voucher ID*	Event Type*	Previously Approved Start Time*	Previously Approved End Time*	Requested Start Time Adjustment**	Requested End Time Adjustment**	Previously Approved Rate*	Requested Rate Adjustment**
1/11/2017	1/12/2017	17B1026	Documentation	9:00 AM	9:30 AM	0:00	0:00	\$23.00	0.00
1/11/2017	1/11/2017	17B1026	Data	9:30AM	9:50 AM	0:00	0:00	\$11.50	0.00



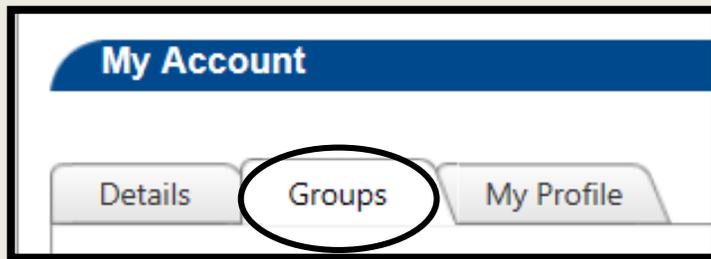
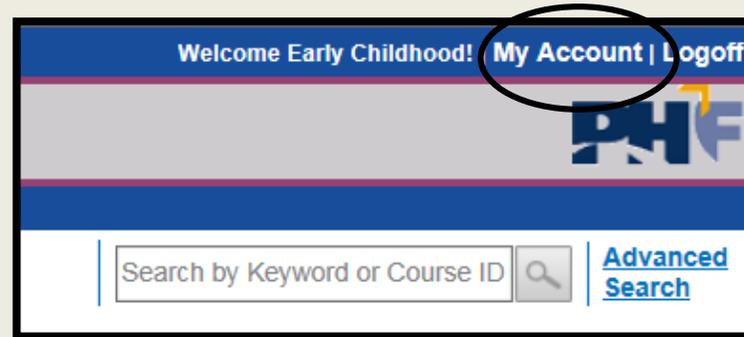
QUICK REMINDERS

OhioTRAIN Update



Please follow the steps below in your account to receive access to resources, training plans, discussions and training announcements:

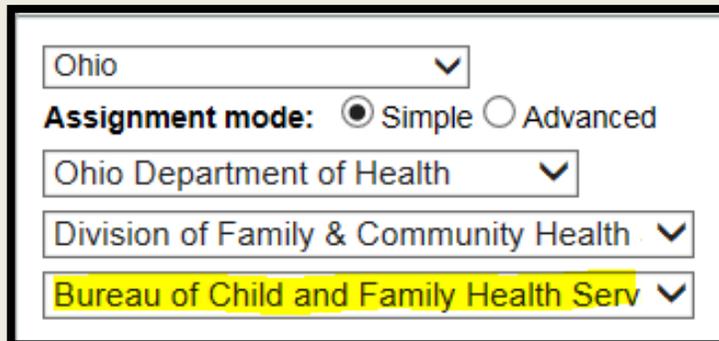
1. Login into your account: www.oh.train.org
2. Select “My Account” listed on the top right corner of the home page.



3. In your account settings, select the “Groups” tab option.
4. Scroll down the page and select the “Select Groups” button for groups in the State Portal.



5. A separate box will prompt you to make your group selection. You may belong to other groups, but in order to get program specific updates, please ensure you select: Bureau of Child and Family Health Services.
6. Press submit at the bottom of the dialogue box.
7. Verify your demographics and employer information is correct – please ensure correct e-mail is listed and verified.
8. Finish by saving changes to your account settings.



Family Engagement Research Study

How it works...

- Healthy Families America Home Visiting Providers
- Researcher shadows 5-10 home visits
- Home visitors complete a brief survey for each family participating
- Home visitor receives \$50 Amazon Gift Card or \$50 worth of supplies for agency
- Family receives \$10 in cash at the end of home visit after completing brief survey

Still need volunteers!!!

- HV's not responding to random selection emails from staff
- Need HV's from Region's 2 & 5!
 - *Franklin & Hamilton County*
- Carla will be contacting HV's in regions 1, 2 or 5
- Erin or Elizabeth will be contacting HV's in regions 3 or 4
- Researchers will work with HV's regarding any concerns/barriers in order to complete the study
- Contact your program consultant if interested

Next Month...



- February 28 – March 2.....HFA Bootcamp (Franklin)
- March 1.....Fundamentals of Home Visiting (Lucas)
- March 8.....OIMRI Quarterly Meeting Webinar (1-2:30pm)
- March 10.....Reflective Supervision (Vinton)
- March 13-17.....HFA Core (Franklin) & HFA PSCO (Pike)
- March 20-24.....GGK Prenatal-36mo (Cuyahoga)
- March 22.....MIECHV Quarterly Meeting Webinar (1-3pm)
- March 23.....Community of Practice Call (1-2pm)
- March 24.....Childhood Trauma (Cuyahoga)



Q&A



THANK YOU!