

## Tracking All Outreach and Service Delivery for Families

### Events

- All activity with families is tracked using “Events” within NewOrg.
- Each event tracks a specific activity and often times includes a standard form to be filled out for that activity
- Events may be scheduled in advance or entered after the fact
- Each event has a date as well as a start time and end time
- Multiple staff may be assigned to an event
- Multiple family members may be assigned to an Event
- In order to allow for individual program reporting and aggregated reporting, all events include organizational fields (e.g. Division, Program)
- Events are specifically set up in the system to address broad community outreach efforts as well as intensive services for “indicated” families
- All events AND the forms within them are all available for reporting purposes

### Event Types

- 01) Personal Encounter ▼
- 01) Personal Encounter
- 02) Group Encounter
- 03) Newborn Encounter
- 04) Prenatal Encounter
- 05) Personal Contact
- 06) Screening (Dev, Health, Vision, etc)
- 07) Family Resource Assessment
- 08) Family Service Plan
- 09) Referral
- A) Screening for Eligibility
- B) Child Enrollment
- C) Child Transition
- D) Child Exit
- Update Contact

Event Type	Form?	Description	Contacts to include
01) Personal Encounter	Yes	Used to track all home visits	All family members and staff present for the visit
02) Group Encounter	Yes	Used to track all group activities with families, including screening events, parent/child interaction groups, parent workshops, etc.	All family members and staff present at the group encounter
03) New Born Encounter	Yes	Used to track all hospital newborn encounters or home visits within six weeks of birth.	All family members and staff present in the encounter
04) Prenatal Encounter	Yes	Used to track all home visits with prenatal mothers	All family members and staff present in the encounter

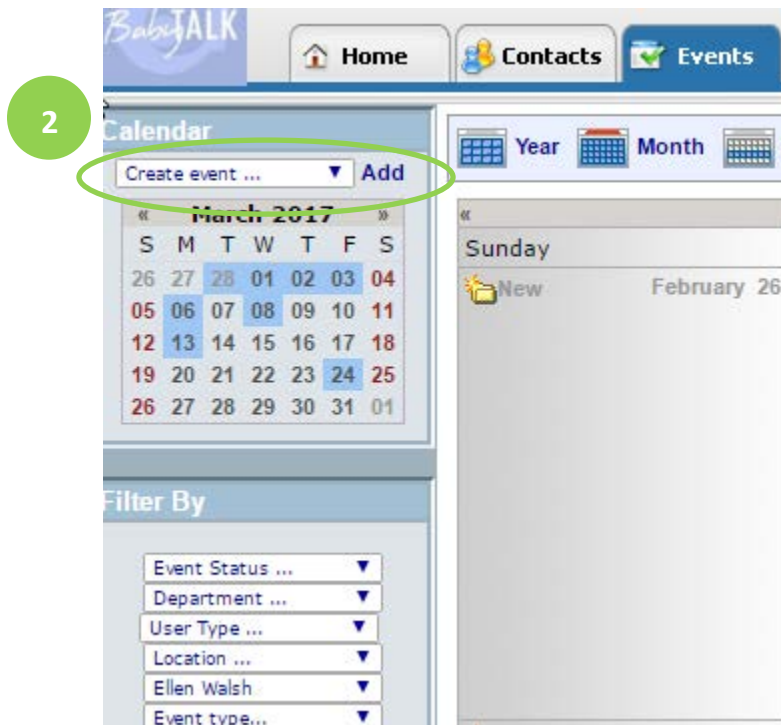
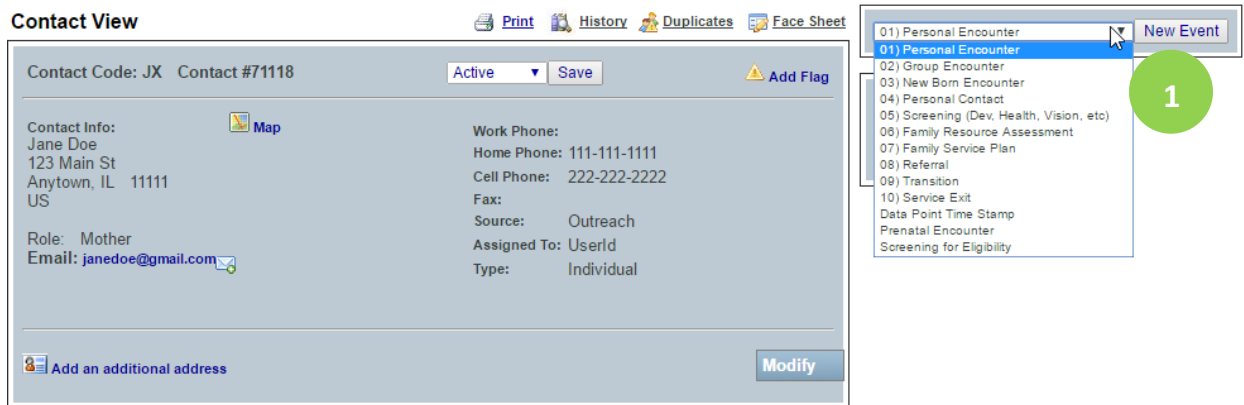
## Tracking All Outreach and Service Delivery for Families

05) Personal Contact	No	Used to track all communication or points of contact with a family, including phone calls, emails, texts, etc.	Both the adult and the related child or children related to the content of the communication
06) Screening (Dev, Health, Vision, etc.)	No	Used to track all screenings either reported from another source or completed by a professional with the family. At this time, there are no specific forms. If, in future, programs capture details of a specific screening tool in a uniform way, forms may be set up to capture these	Child screened; including others is optional
07) Family Resource Assessment (FRA)	Yes	Used to track initial and periodic, regular updates for the Baby TALK FRA document/form for each family. The assessment and data within the form serves to track strengths and needs for families and to show progress over time.	Primary caregiver
08) Family Service Plan	No	Used to track family IFSP goals on a periodic, regular basis. All details for the goals are captured on the event, and no additional form is necessary	Primary caregiver
09) Referral	No	Used to track all referrals made for families. All details relevant for the referral are captured on the event, and no additional form is necessary	Primary caregiver and child related to the referral
A) Screening for Eligibility	Yes	Used to track the weighted eligibility form used for a child prior to enrolling them for intensive services. Will show an eligibility screening has taken place. The screening and data within the event is to help decide whether the child is eligible for service.	Child; including Primary caregiver is optional  *multiple children in the same family will each have an eligibility event
B) Child Enrollment	No	Used to track the date that services began for the child	Child; including others is optional
C) Child Transition	Yes	Used to track the use of the transition documentation form for families	Child; including others is optional
D) Child Exit	No	Used to track the date on which a child exits the program	Child only; including others is optional
Update Contact	No	Used to track changes to the status of all data relevant for reporting to funders, within grant proposals, etc.	N/A – This event applies to only the contact you choose initially

## General Event Functionality

### Beginning to Enter an Event

- 1 You may choose to first find a contact and then start the event. From within the contact, select the "Event Type" and click <New Event>
- 2 You may choose to start entering an event from the <Event> tab.



## Tracking All Outreach and Service Delivery for Families

### Fields and values common to all Events

The first screen you see will contain all of the general information tracked for the event.

The screenshot shows a web form for creating an event. It is divided into several sections:

- Section 1:** Contains an 'Event:' text field, a 'Contact:' dropdown menu (showing 'Jane Doe (71118)'), and a 'Type:' dropdown menu (showing '01) Personal Encounter'). There is also an 'Edit' button and a 'Create Recurrence' button in the top right.
- Section 2:** Contains a 'Date:' field with a calendar icon (showing '03/01/2017'), 'Start Time:' and 'End Time:' dropdown menus (both showing '3:00 PM'), and a 'Remind me:' field (showing '0 days before this event.').
- Section 3:** Contains a 'Description:' text area, an 'Assigned To:' dropdown menu (showing 'UserId'), and a 'Notify me if not closed in:' dropdown menu. Below these are three dropdown menus for 'Status:' (showing 'Pending'), 'Open/Closed:' (showing 'Open'), and 'Access:' (showing 'Public').
- Section 4:** Contains three dropdown menus for 'Division', 'Program', and 'Encounter Location'. Below these are four buttons: 'Save', 'Save & New', 'Save & Close', and 'Cancel'. There are also two checkboxes: 'Copy Contacts' and 'Copy Event'.

1 In the first section, you may enter a description of the event that is meaningful to you. This will appear in many of the standard views of events.

2 In the second section, enter the applicable date and times for the event. Note: We are not initially implementing “Remind me” functionality. Instead, you may find “pending” events in the <Event> tab.

3 For events that have already occurred, choose “Complete” and “Closed”. Pending and open are only for the events that you schedule in advance.

*Note: “Access” not used.*

4 In order to add participants and/or additional staff you must first <Save> the general information.

## Tracking All Outreach and Service Delivery for Families

Once you save the event, you will be able to add contacts, add staff, and the associated form. Use the upper right tab <Contacts> and <More Staff>

**Event Edit**   Standard Summary ▾   Print   History   Outlook   **Event Details** **4**   Contacts   Files   Advanced

---

[Create Recurrence](#)

Event:

Contact: **Jane Doe (71118)** [Edit](#)   Type: **01) Personal Encounter** ▾

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Date: **03/01/2017** (mm/dd/yyyy)   Start Time: **9** ▾ : **00** ▾ : **AM** ▾

Remind me: **0** days before this event.   End Time: **10** ▾ : **00** ▾ : **AM** ▾

Minutes: **60**

---

Description:

Assigned To

▾

[More Staff](#)

**5**

Notify me if not closed by: [Edit](#)

Status: **Pending** ▾   Open/Closed: **Open** ▾   Access: **Public** ▾

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Division  ▾

Program  ▾

Encounter Location  ▾

Available Forms/Surveys [Create Personal Encounter](#)

[Save](#)   [Save & New](#)   [Save & Close](#)   [Cancel](#)

Copy Contacts

*Note: The fields you see in the bottom section of the screen vary, depending on the "Event Type", these are described within instructions for each event*

## Tracking All Outreach and Service Delivery for Families

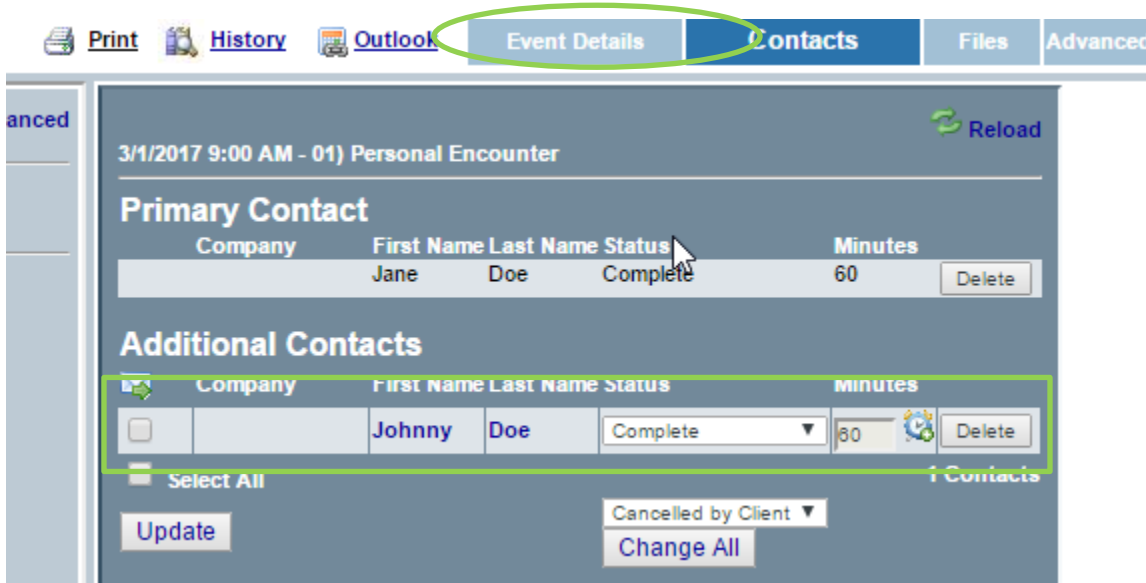
### Add more Contacts to Event

4

Click on the <Contacts> tab on the upper right of the Event screen. Use Search to pull up list of contacts and click <Add>



On the contact view, you will maintain the status for each person. Note: The primary contact status is the same status as the Event status. Once you have added and/or updated contacts, click on <Event Details> to get back to the main screen for the event.



## Tracking All Outreach and Service Delivery for Families

### Add more Staff to Event

5

Once you click on <More staff> (see above), you will be able to select additional staff for the event. Use <Ctrl> key to select multiple staff.

Description:

Assigned To  
 Userid

Additional Staff:

- Amy Malone - admin
- Amy Malone - enduser
- April Ingram
- Cindy Bardeleben
- Deb Widenhofer

Description:

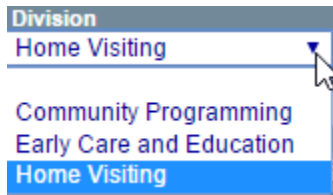
Notify me if not closed by: [Edit](#)

Assigned To	Status	Minutes	Payroll
Userid <input type="text"/>	Cancelled by Client <input type="text"/>	<input type="text"/>	Hourly
<input type="button" value="More Staff"/>			
Additional Staff	Status	Minutes	
Amy Malone - enduser	Complete <input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Cindy Bardeleben	Complete <input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="button" value="Delete"/>			

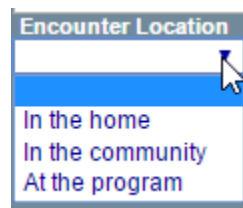
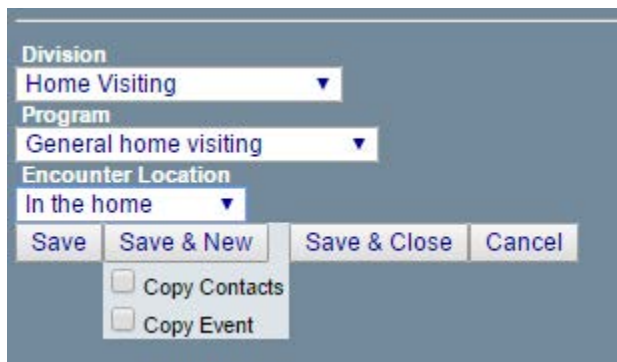
## Tracking All Outreach and Service Delivery for Families

### Event-specific fields

In order to report both in aggregate across the Baby TALK network and within individual programming, it is critical for certain values to be tracked within each Event. The list varies by event type. Note: ALL events must have “Division” and “Program”. Division is common across all Baby TALK agencies.



### Personal Encounter and Prenatal Encounter



### Group Encounter




Program Location and Activity are specific to each the agency



# Tracking All Outreach and Service Delivery for Families

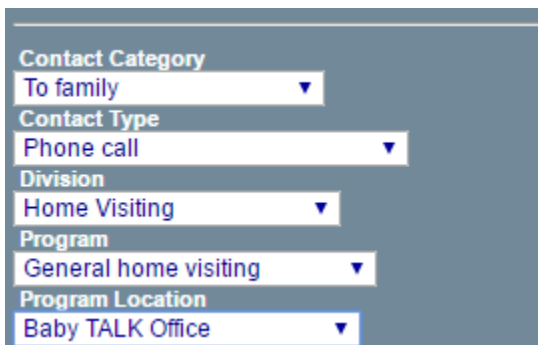
## Newborn Encounter



Division  
Community Programming ▼  
Program  
Universal Screen & Outreach ▼  
Program Location  
St. John's Hospital ▼

Program location is specific to each agency

## Personal Contact

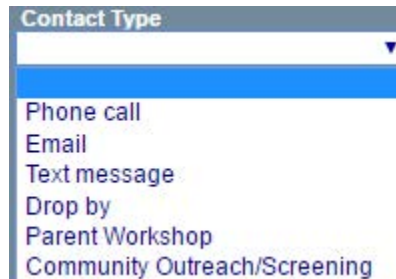


Contact Category  
To family ▼  
Contact Type  
Phone call ▼  
Division  
Home Visiting ▼  
Program  
General home visiting ▼  
Program Location  
Baby TALK Office ▼



Contact Category

- To family
- From family
- To community partner
- From community partner
- Other

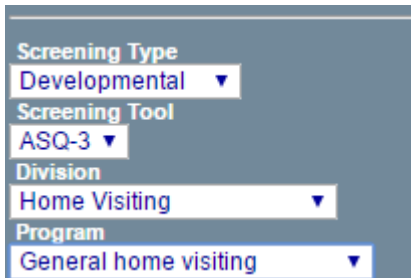


Contact Type

- Phone call
- Email
- Text message
- Drop by
- Parent Workshop
- Community Outreach/Screening

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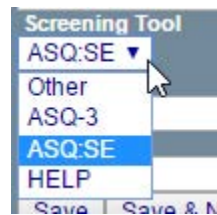
### Screening



Screening Type  
 Developmental ▾  
 Screening Tool  
 ASQ-3 ▾  
 Division  
 Home Visiting ▾  
 Program  
 General home visiting ▾



Screening Type  
 ▾  
 Developmental  
 Hearing  
 Medical  
 Social Emotional  
 Vision



Screening Tool  
 ASQ:SE ▾  
 Other  
 ASQ-3  
 ASQ:SE  
 HELP  
 Save | Save & N

### Family Resource Assessment, Family Service Plan (IFSP), Referral, Transition, Screening for Eligibility



Division  
 Home Visiting ▾  
 Program  
 General home visiting ▾

### Planning an Event

- Enter the Date and Times to reflect when you plan to have your personal encounter or group encounter.
- Enter Status to "Pending"
- Assign staff name(s)
- Add contacts (if applicable)

# Tracking All Outreach and Service Delivery for Families

## Documenting an Event

- Enter general notes
- Mark the status as "Complete"
- Mark "Closed"
- Add contacts as needed
- Note: Update each contact to the appropriate status
- Fill in associated form for the event (if the event is associated with a form)

**Event Edit**    Standard Summary ▼    Print    History    Outlook    **Event Details**    Contacts    Files    Advanced

[Create Recurrence](#)

Event:

Contact: **Jane Doe (71118)**    Edit    Type: **01) Personal Encounter** ▼

Date: **03/01/2017** (mm/dd/yyyy)    Start Time: **9** : **00** : **AM** ▼  
Remind me: **0** days before this event.    End Time: **10** : **00** : **AM** ▼  
Minutes: **60** 🕒

Description:

Assigned To: **UserId** ▼    [More Staff](#)

Notify me if not closed by: [Edit](#)

Status: **Pending** ▼    Open/Closed: **Open** ▼    Access: **Public** ▼

Division:  ▼  
Program:  ▼  
Encounter Location:  ▼

Available Forms/Surveys: **Create Personal Encounter**

[Save](#)    [Save & New](#)    [Save & Close](#)    [Cancel](#)

Copy Contacts



## Tracking All Outreach and Service Delivery for Families

### Updating Status of an Event

- When an event is cancelled or otherwise does not occur, choose the appropriate status for the event
- Use these options. Note: Only use “Void” if the event was entered in error.

Cancelled by Client  
Cancelled by Staff  
Complete  
No Show  
Pending  
Rescheduled  
Void

- Mark “Closed”
- Note: Be sure to update each contact to the appropriate status