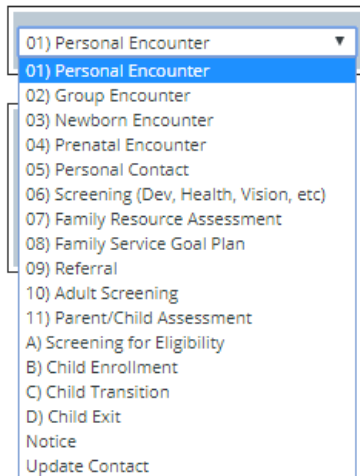


Events:

- 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 Type:



Event Type	Form?	Description	Contacts to include
01) Personal Encounter	Yes	Used to track all home visits	Primary and child ; all other family members (exclude Prenatal)
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) Newborn Encounter	Yes	Used to track all hospital newborn encounters or home visits within six weeks of birth.	Primary Caregivers and Newborn
04) Prenatal Encounter	Yes	Used to track all home visits with prenatal mothers	Primary and Unborn child
05) Personal Contact	No	Used to track all communication or points of contact with a family, including phone calls, emails, texts, etc.	Primary (and Child if this is the initial contact)

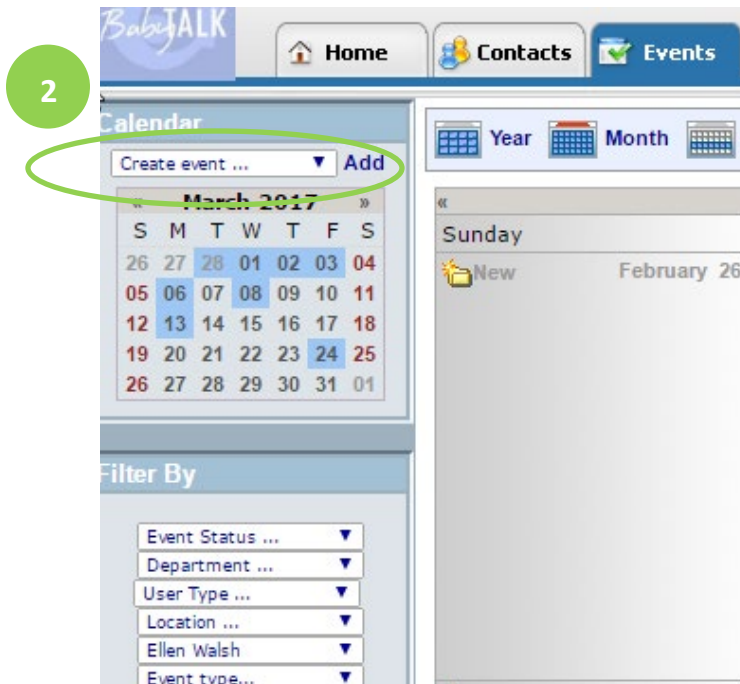
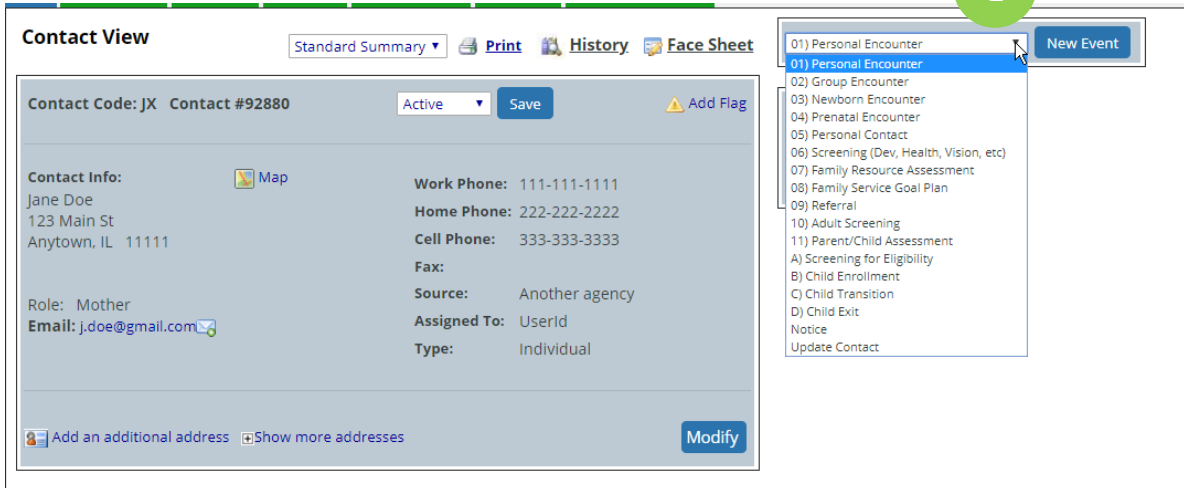
Tracking All Outreach and Service Delivery for Families

Event Type	Form?	Description	Contacts to include
06) Screening (Dev, Health, Vision, etc.)	Yes	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
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 Goal Plan	No	Used to track family IFGP 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 and child related to the referral <u>unless</u> child specific then Child is the primary contact
10) Adult Screening	No	Used to track screenings for maternal depression, substance abuse, etc.	Primary or other adult in family
11) Parent/Child Assessment	Yes	Most programs have chosen PICCOLO as their parent/child assessment tool.	Primary Caregiver and Child being assessed
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 only - 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 only -multiple children in the same family will each have an enrollment event
C) Child Transition	Yes	Used to track the use of the transition documentation form for child	Child only
D) Child Exit	No	Used to track the date on which a child exits the program	Child only
Update Contact	No	Used to track changes to the status of all data relevant for reporting to funders, within grant proposals, etc. *Child update must begin from the child contact's calendar icon.	N/A – This event applies to only the contact you choose initially.

General Event Functionality

Beginning to Enter an Event

- 1 Search for the 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



Note: When using the “Events” tab to create an event, it is important you choose the correct “contact” and “Event type” once the event opens.

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-based form for creating an event. It includes the following fields and controls:

- 1** **Event:** A text input field for the event name.
- Contact:** A dropdown menu showing "Jane Doe (71118)".
- Type:** A dropdown menu showing "01) Personal Encounter".
- 2** **Date:** A date picker showing "03/01/2017".
- Start Time:** Time selection fields for "3 : 00 : PM".
- End Time:** Time selection fields for "3 : 00 : PM".
- Remind me:** A field for "0 days before this event".
- Minutes:** A field for "0" minutes.
- Description:** A large text area for the event description.
- Assigned To:** A dropdown menu showing "UserId".
- 3** **Status:** A dropdown menu showing "Pending".
- Open/Closed:** A dropdown menu showing "Open".
- Access:** A dropdown menu showing "Public".
- 4** **Assigned To:** A dropdown menu showing "UserId".
- Buttons:** "Save", "Save & New", "Save & Close", and "Cancel".
- Checkboxes:** "Copy Contacts" and "Copy Event".

1 **Event:** You may enter a description of the Event that is meaningful to you. It is important to name "Personal Encounters" with the child's name. This will appear in many of the standard views of events.

2 **Date:** Enter the applicable date and times for the event.

3 **Status:** For events that have already occurred choose "Complete" and **Open/Closed:** choose "Closed". "Pending" and "Open" are only for the events that you schedule in advance.

Note: Access is not used.

4 **Assigned To:** 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. To add additional event contact click the upper right <Contacts> tab or click <Edit> next to the main event contact. To add additional staff click <More Staff>.

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

Event: _____ **5** → Create Recurrence

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 Create Personal Encounter

Forms/Surveys Save Save & New Save & Close Cancel

Copy Contacts

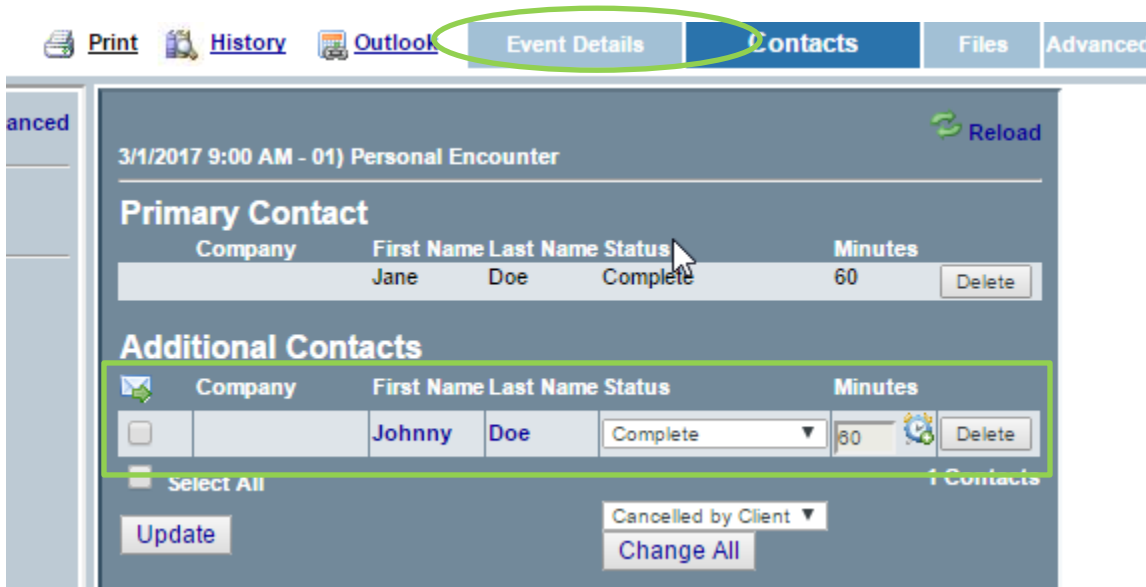
Note: The fields you see in this bottom section of the screen vary, depending on the "Event Type". These are described within the instructions of each "Event".

ADD MORE CONTACTS TO EVENT:

- 5 Click on the <Contacts> tab on the upper right of the Event screen. Use Search to pull up the list of contacts and click <Add> next to the contact you would like to add to the “Event”.



On the “Contacts” 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 of the event.*



ADD MORE STAFF TO EVENT:

5

Once you click on <More staff>, 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

Save

Description:

Assigned To: Userid Status: Cancelled by Client Minutes Payroll: Hourly

More Staff

Additional Staff	Status	Minutes
Amy Malone - enduser	Complete	<input type="text"/>
Cindy Bardeleben	Complete	<input type="text"/>

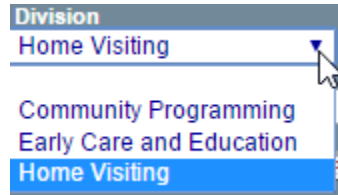
Delete

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

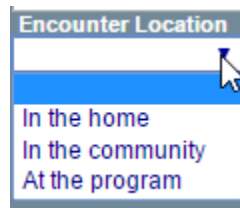
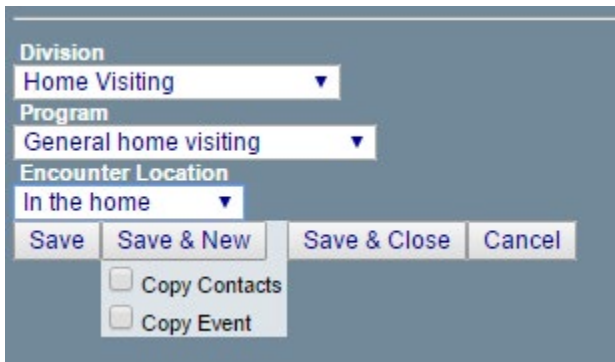
Tracking All Outreach and Service Delivery for Families

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	

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 Goal Plan (IFGP), 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)

Documenting an Event

- Enter general notes
- Mark the status as “Complete”
- Mark “Closed”
- Add contacts as needed
- Note: Update contacts 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

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 below. *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: When the primary contact status is updated on an event additional contact statuses, that are equal to the primary status, will also be updated.

Additional Event Status information for tracking

- Enter all planned visits as pending, in order to track on calendar and schedule effectively with families
- When a pending day/time arrives, it will either be:
 - Completed with the family
 - Mark event as complete, (additional contacts in the visit automatically marked complete)
 - Go to contacts tab to mark any who were planned for the visit who did not participate in visit, as needed
 - Document form when necessary
 - Not completed
 - Mark event as “no show”, “reschedule”, etc. as applicable
 - If/when rescheduled, enter new event with the new planned date, and pending status (do not change date on current planned visit*)

*Keeping the full history of completed, ‘no show’, and rescheduled visits will provide a full picture of the HV engagement with the family. Completion rates will only ever come from those visits completed. If you find a low completion rate when reporting, you will have data to support engagement if there were a number of ‘no show’ or rescheduled visits on behalf of the family. This will provide data to support further thinking about engagement strategies and possible causes for low completion rates.