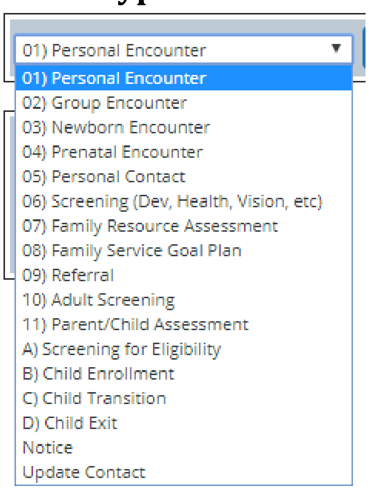
Tracking All Outreach and Service Delivery for Families

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 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

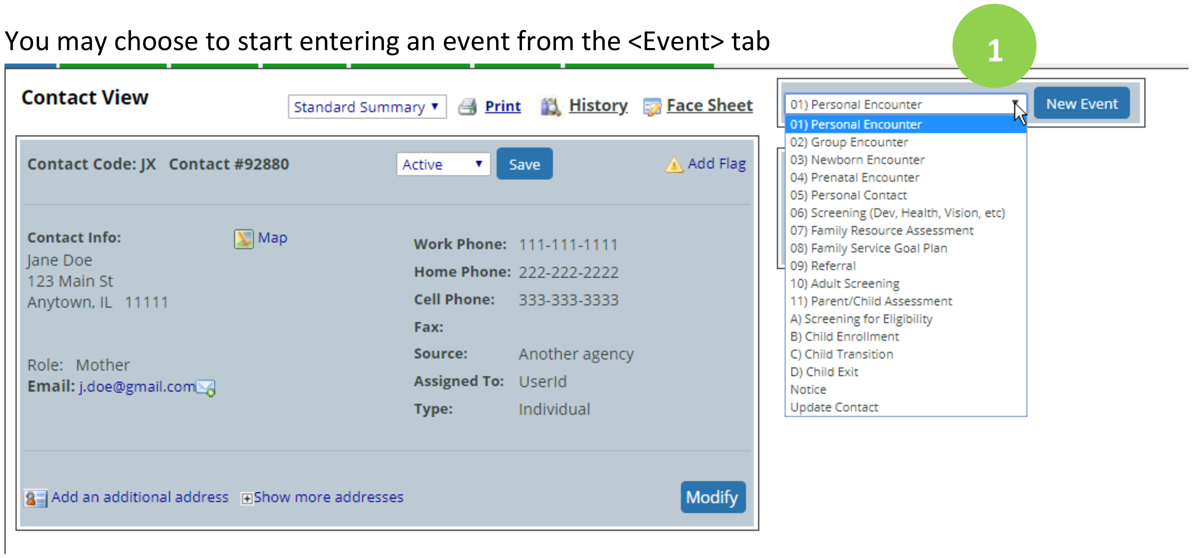
Event Type	Form?	Description	Contacts to include
06) Screening (Dev, Health, Vision, etc.)	Yes	Used to track all screenings either reported from another source or completed by a professional with the family. At this time, there are no specific forms. If, in future, programs capture details of a specific 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 unless 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.

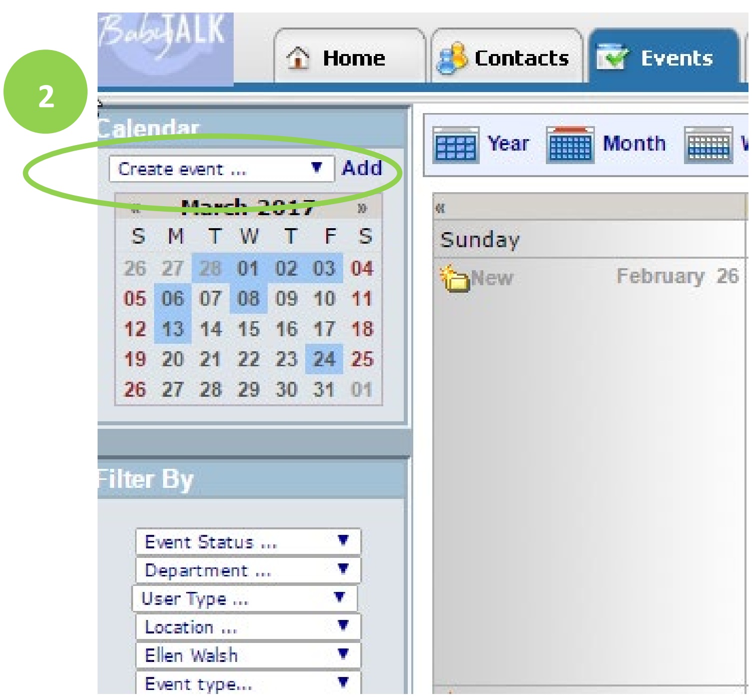
General Event Functionality

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

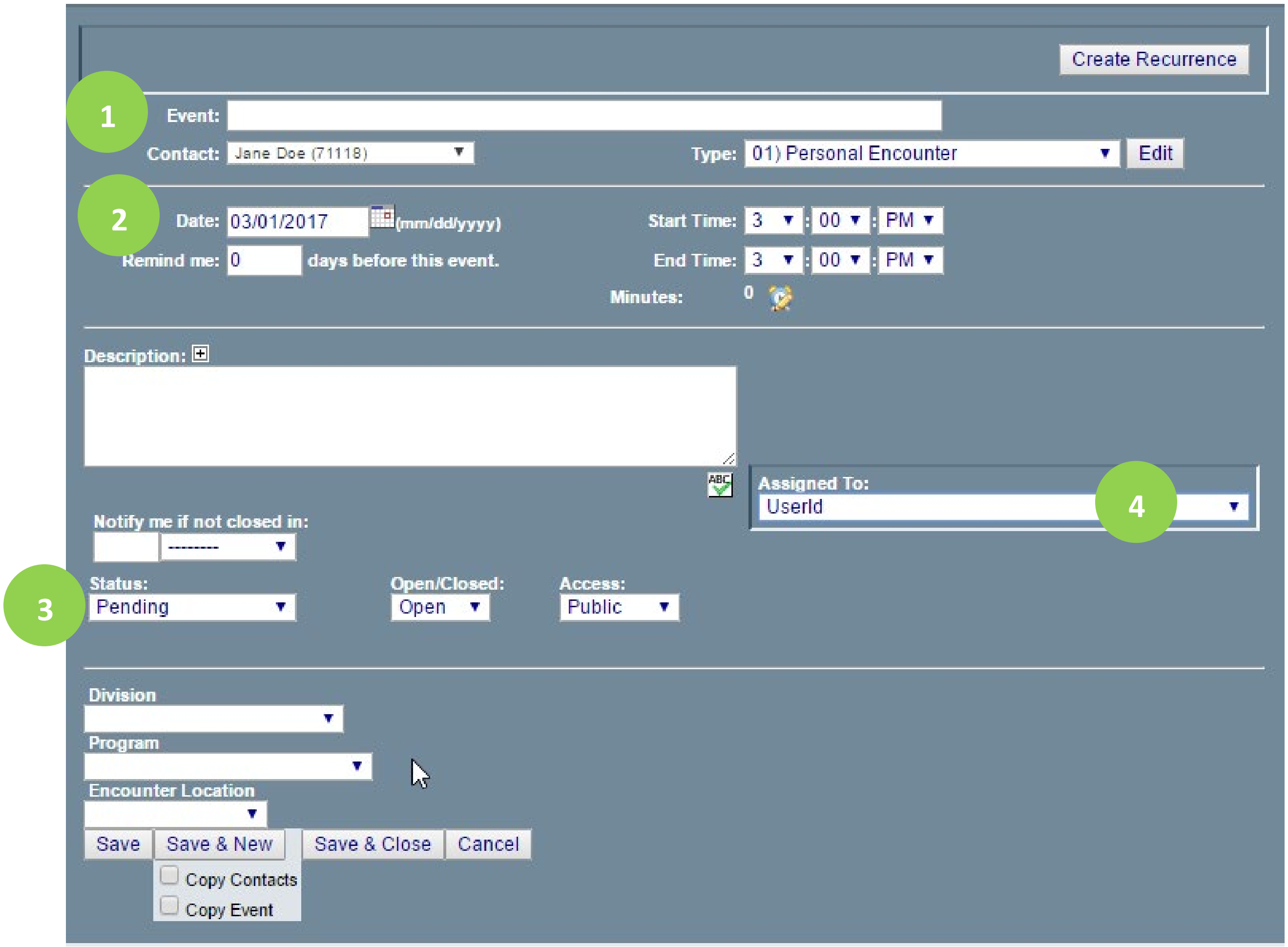




*Note: When using the "**Events**" tab to create an event, it is important you choose the correct "contact" and "Event type" once the event opens.*

Fields and values common to all Events

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



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.

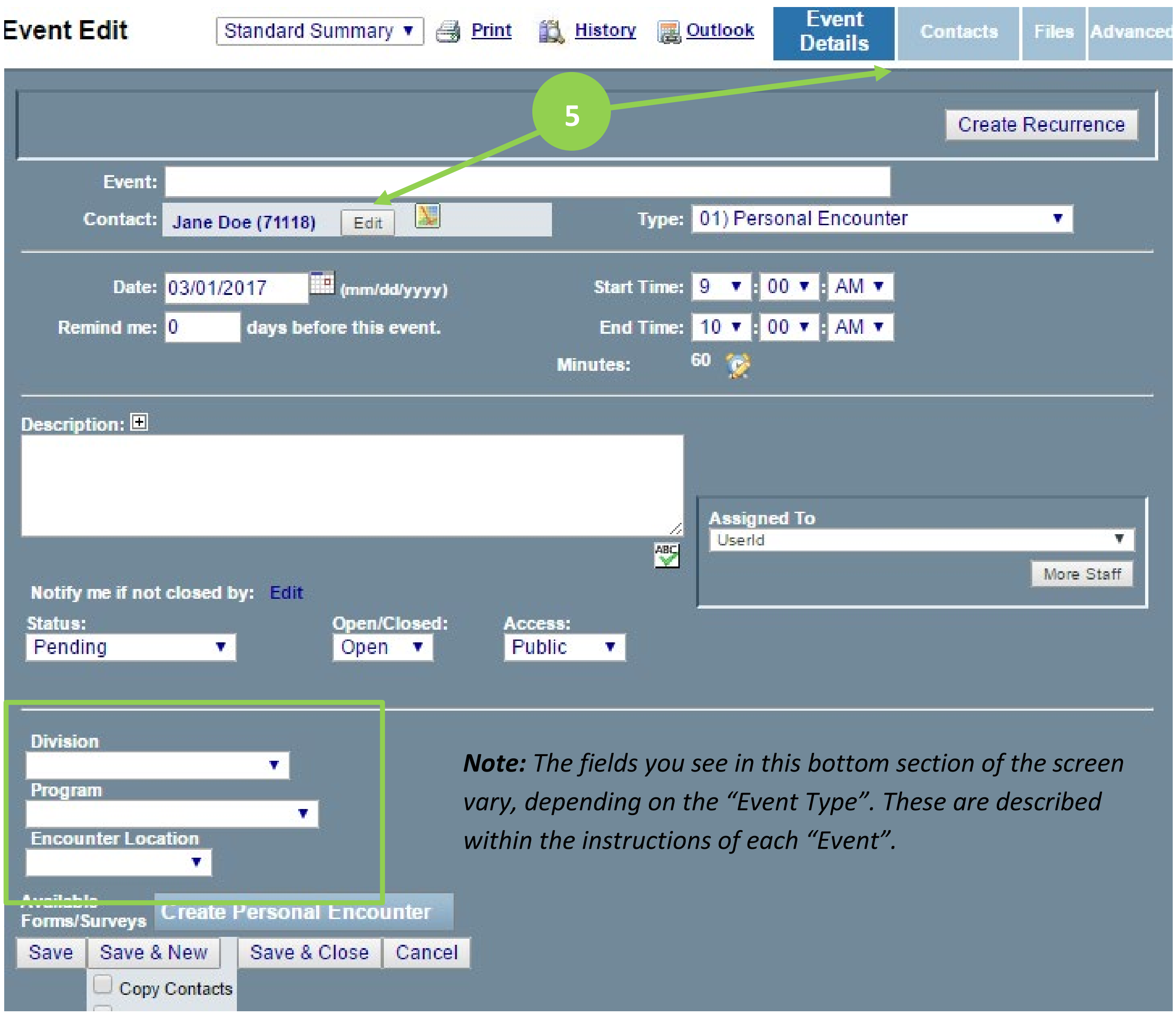
2 **Date**: Enter the applicable date and times for the event.

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.

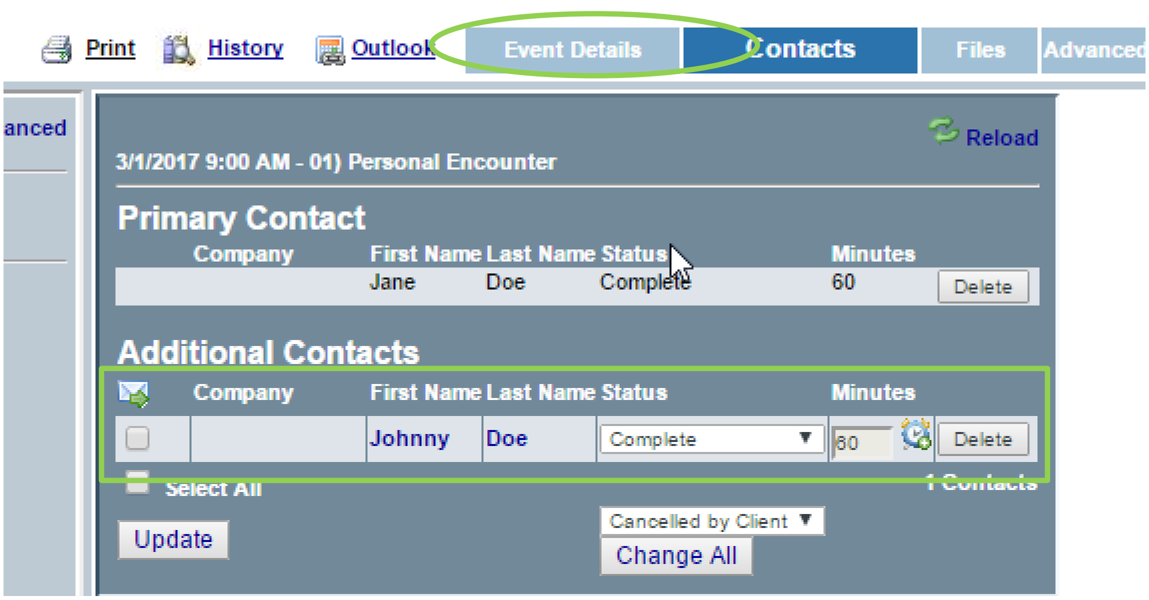
Once you save the event, you will be able to add contacts, add staff, and the associated form. To add additional event contact click the upper right <Contacts> tab or click <Edit> next to the main event contact. To add additional staff click <More Staff>.



ADD MORE CONTACTS TO EVENT:

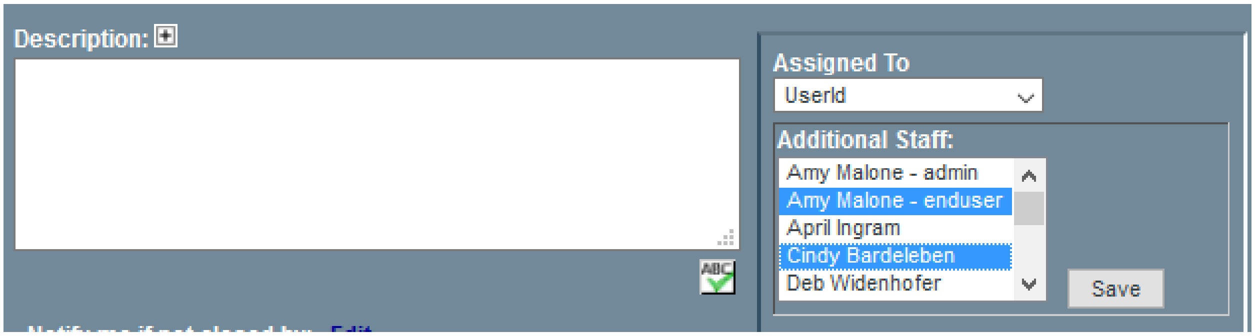
5 Click on the <Contacts> tab on the upper right of the Event screen. Use Search to pull up the list of contacts and click <Add> next to the contact you would like to add to the “Event”.

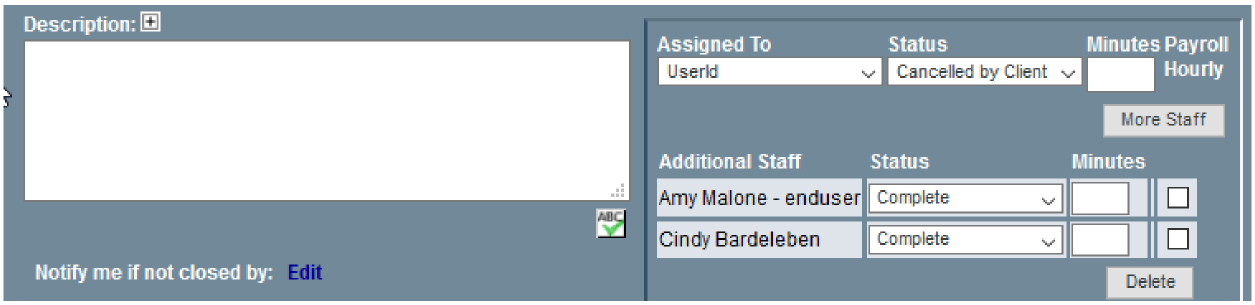
On the “Contacts” view, you will maintain the status for each person. ***Note**: The primary contact status is the same status as the “Event” status. Once you have added and/or updated contacts, click on <Event Details> to get back to the main screen of the event.*



ADD MORE STAFF TO EVENT:

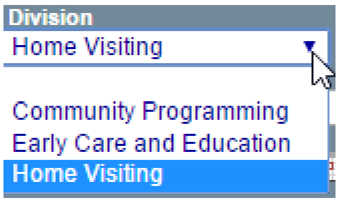
5 Once you click on <More staff>, you will be able to select "Additional Staff" for the event. Use <Ctrl> key to select multiple staff.



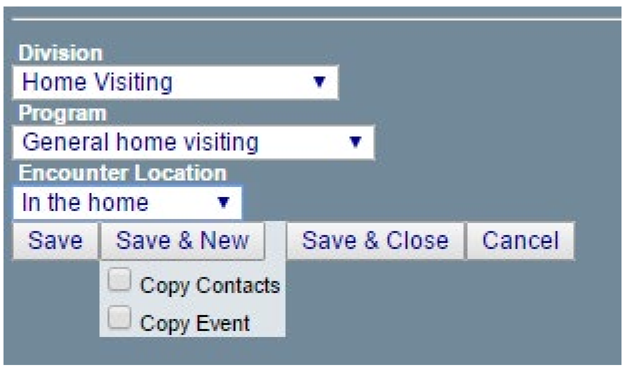


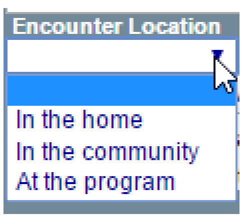
Event-specific fields:

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.*

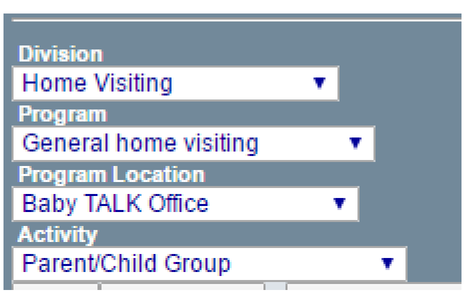


Personal Encounter and Prenatal Encounter



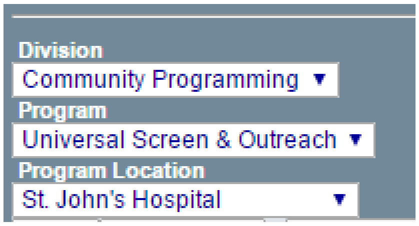


Group Encounter



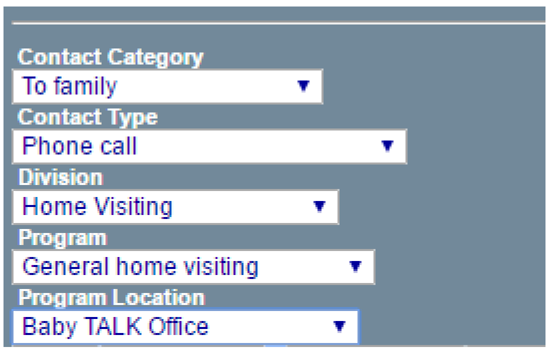
Program Location and Activity are specific to each the agency

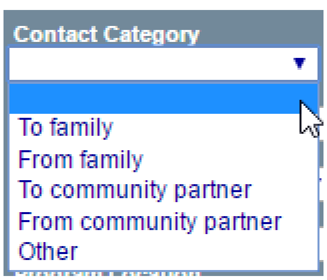
Newborn Encounter

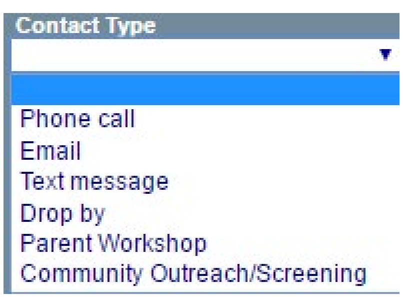


Program location is specific to each agency

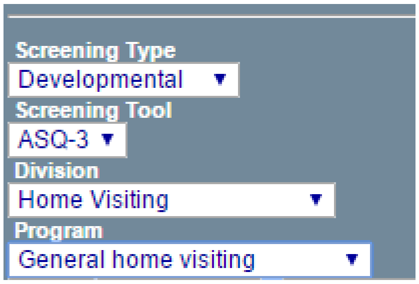
Personal Contact

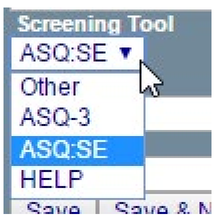






Screening





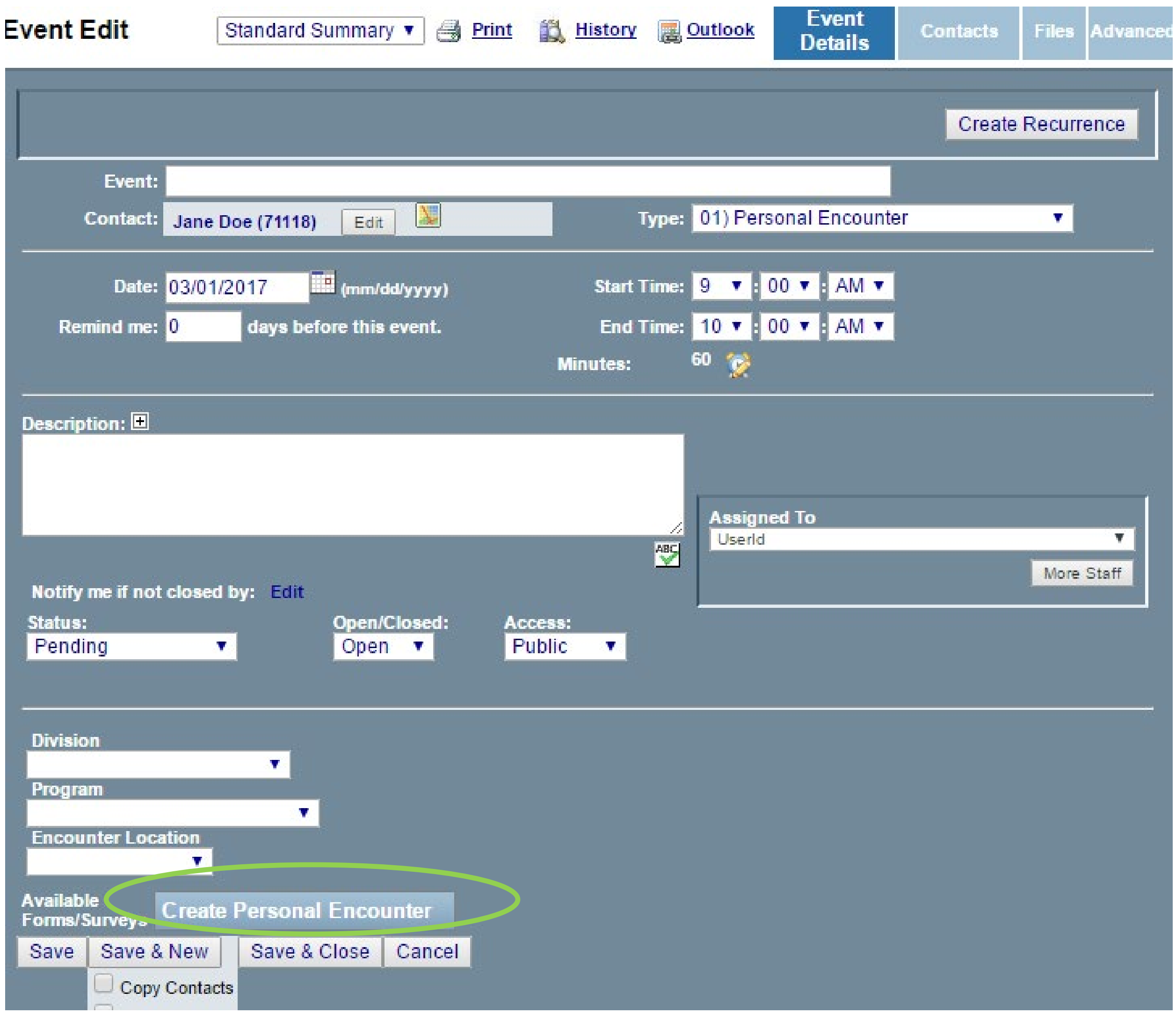
Family Resource Assessment, Family Service Goal Plan (IFGP), Referral, Transition, Screening for Eligibility

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)



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:
  a. Completed with the family
     i. Mark event as complete, (additional contacts in the visit automatically marked complete)
     ii. Go to contacts tab to mark any who were planned for the visit who did not participate in visit, as needed
     iii. Document form when necessary
  b. Not completed
     i. Mark event as "no show", "reschedule", etc. as applicable
     ii. If/when rescheduled, enter <u>new</u> 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.

