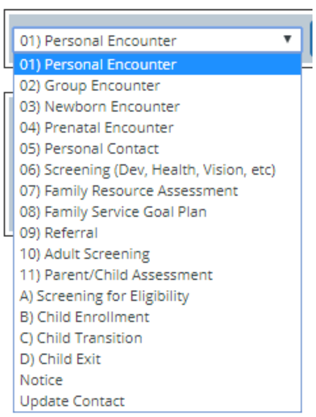
Tracking All Outreach and Service Delivery for Families

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



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

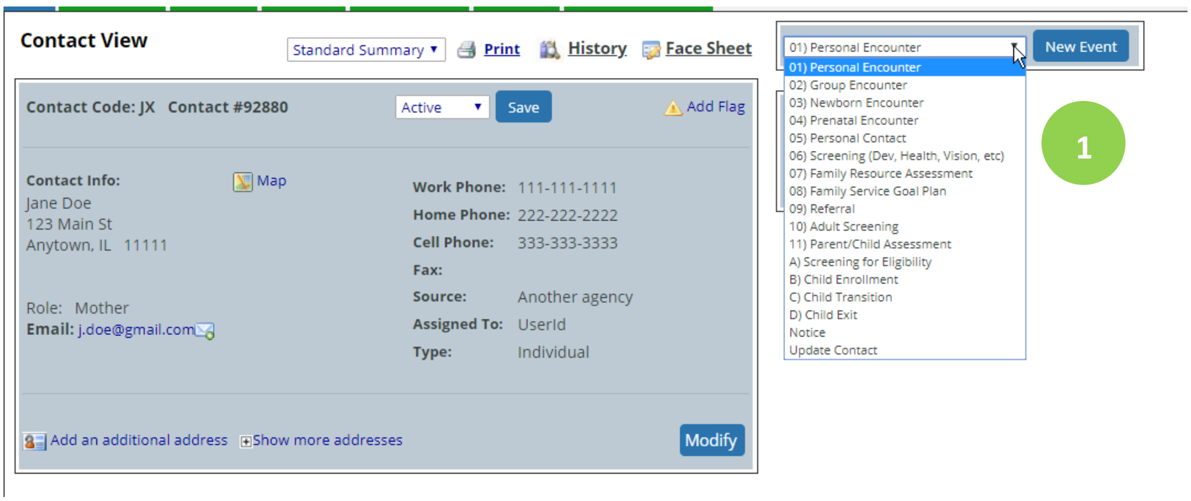
05) Personal Contact	No	Used to track all communication or points of contact with a family, including phone calls, emails, texts, etc.	Both the adult and the related child or children related to the content of the communication
06) Screening (Dev, Health, Vision, etc.)	Yes	Used to track all screenings 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; 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 unless child specific then Child is Primary
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.	Child
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	Yes	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.



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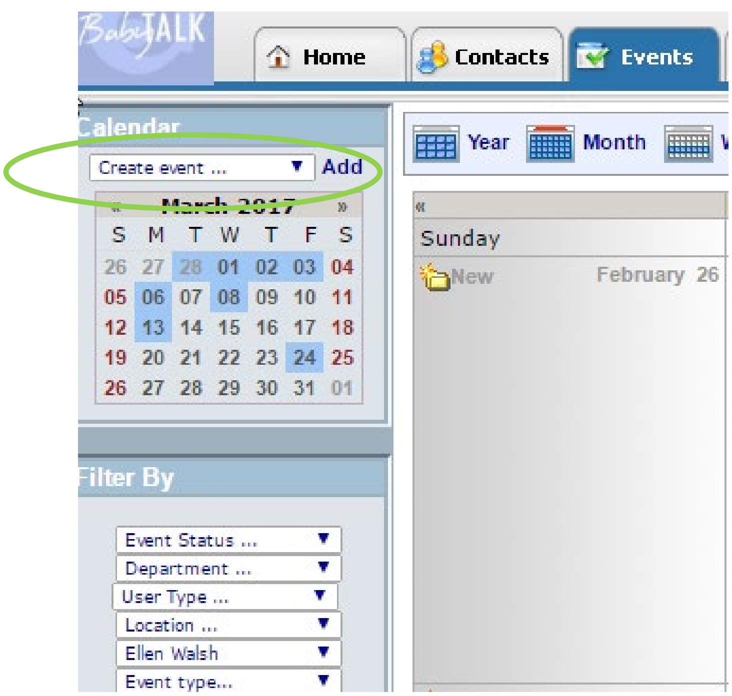
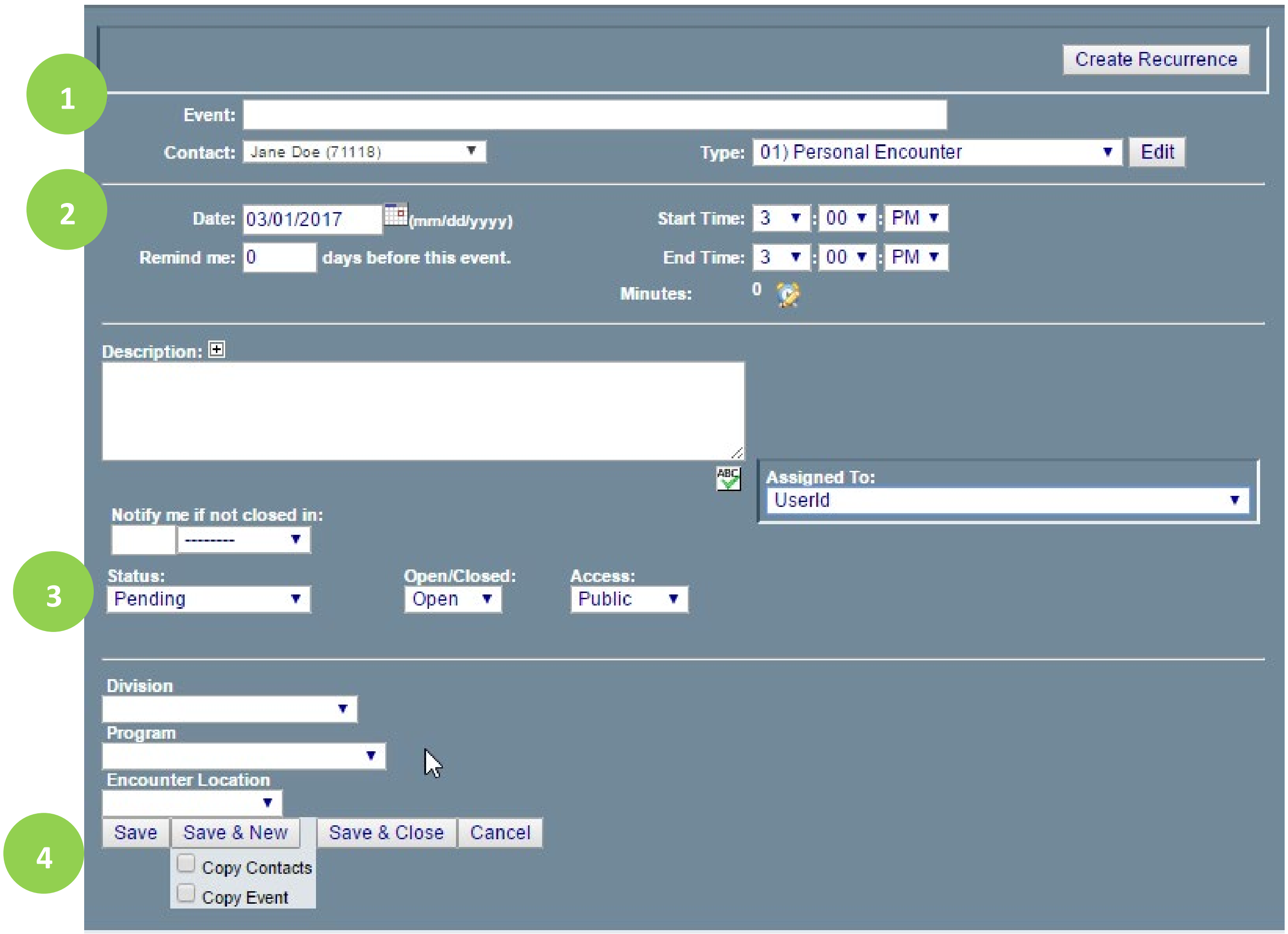


***When using the events tab to create and event it is important you choose the correct contact and event type once the event opens.

Fields and values common to all Events

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



1. 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.

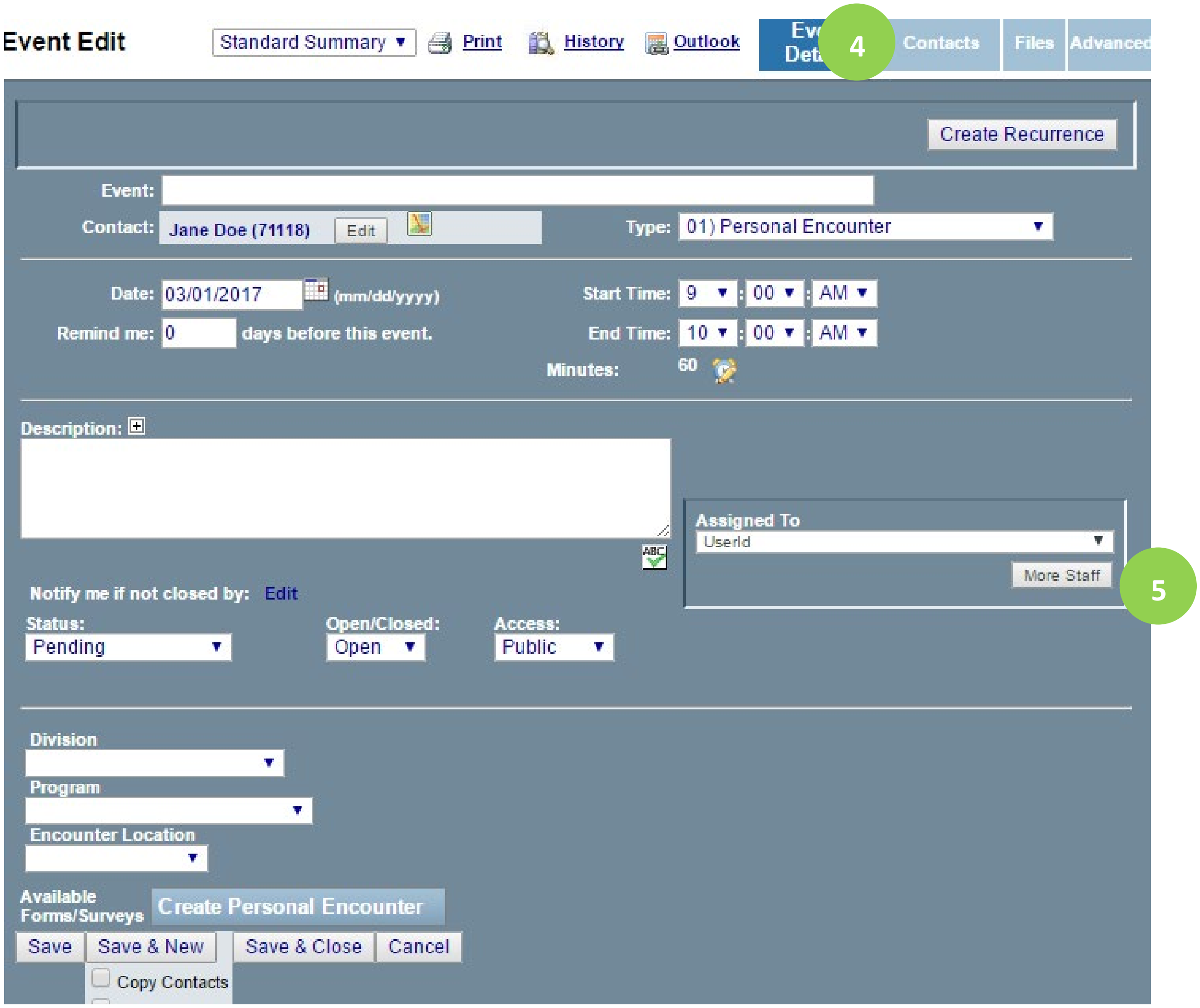
2. In the second section, enter the applicable date and times for the event. Note: We are not initially implementing “Remind me” functionality. Instead, you may find “pending” events in the <Event> tab.

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.

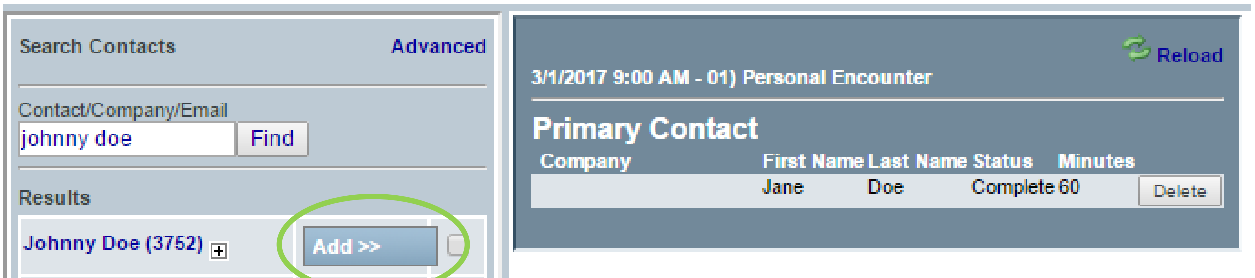
Once you save the event, you will be able to add contacts, add staff, and the associated form. Use the upper right tab <Contacts> and <More Staff>



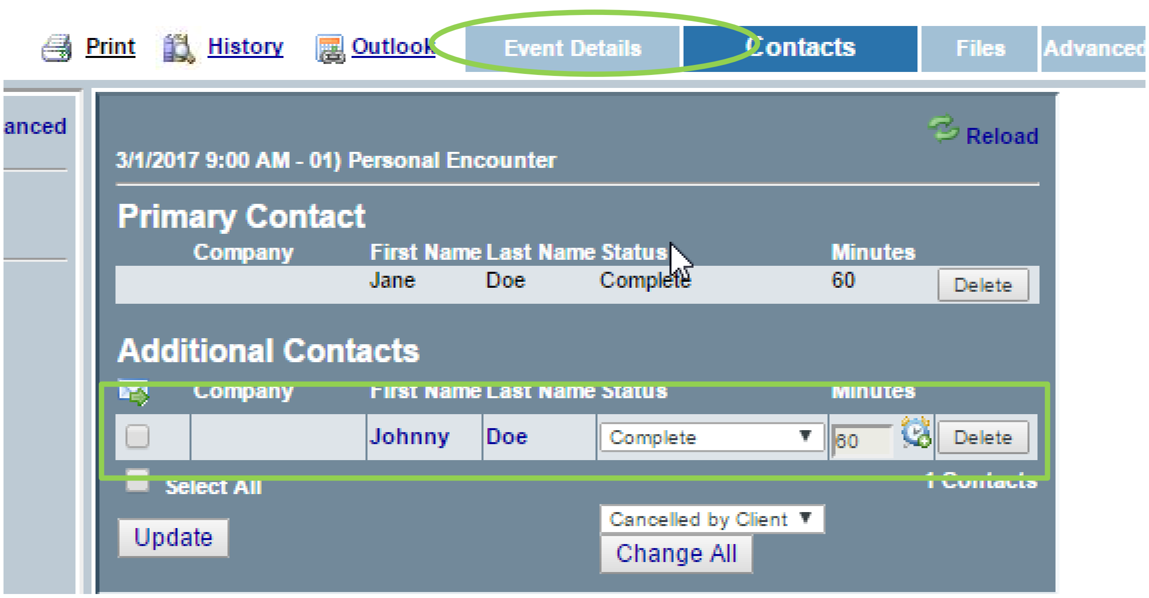
Note: The fields you see in the bottom section of the screen vary, depending on the "Event Type", these are described within instructions for each event

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>

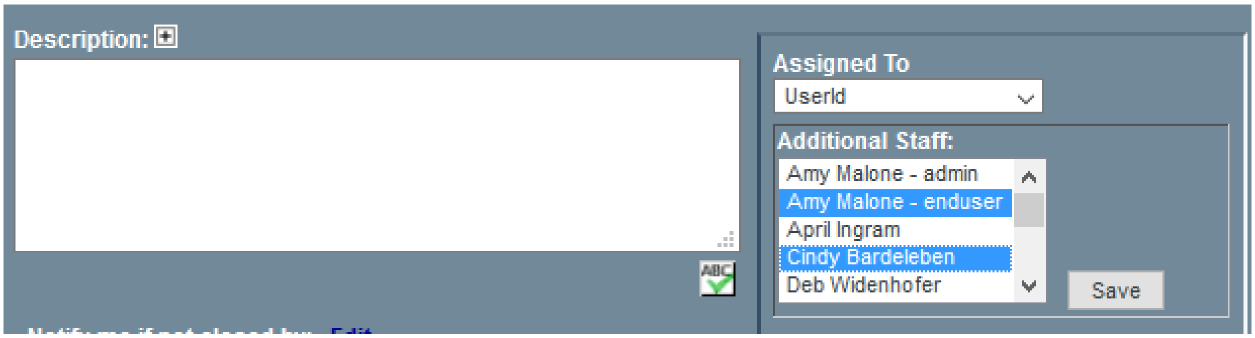


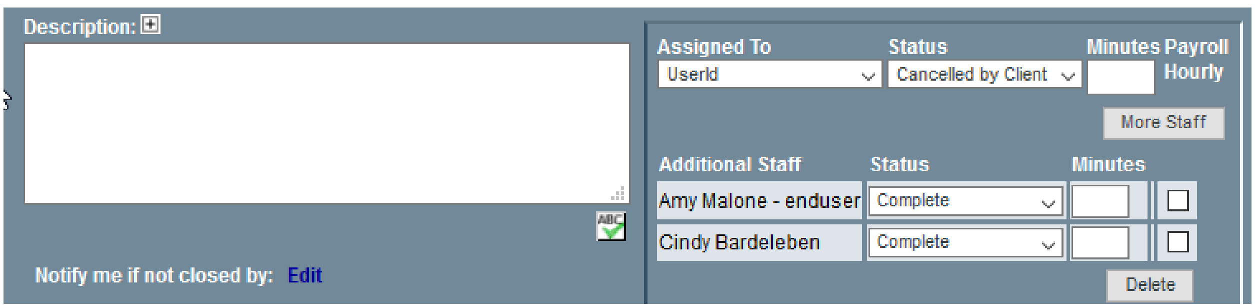
On the contact view, you will maintain the status for each person. Note: The primary contact status is the same status as the Event status. Once you have added and/or updated contacts, click on <Event Details> to get back to the main screen for the event.



Add more Staff to Event

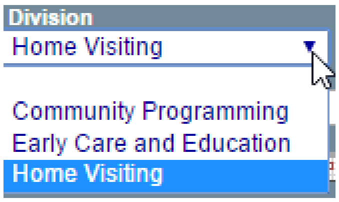
5 Once you click on <More staff> (see above), you will be able to select additional staff for the event. Use <Ctrl> key to select multiple staff.



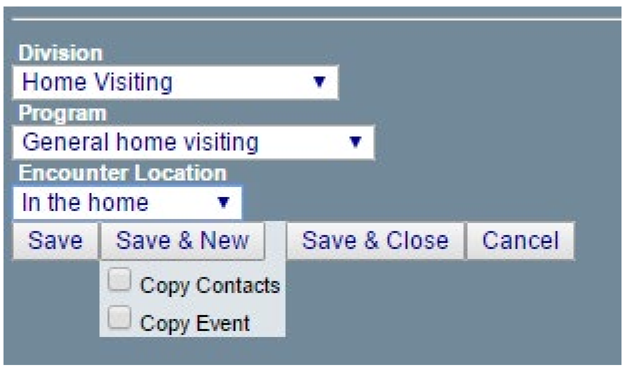


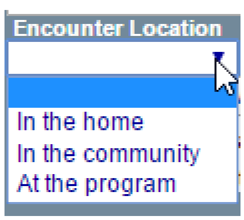
Event-specific fields

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.

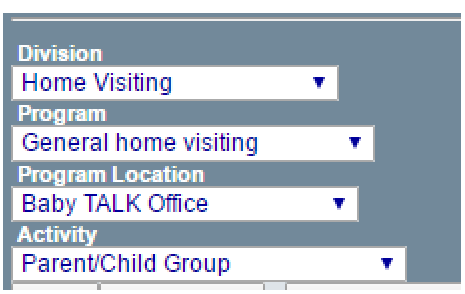


Personal Encounter and Prenatal Encounter



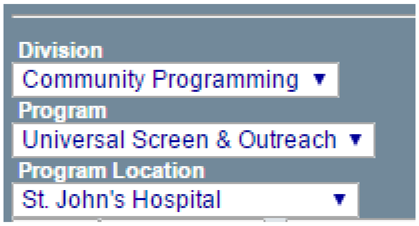


Group Encounter



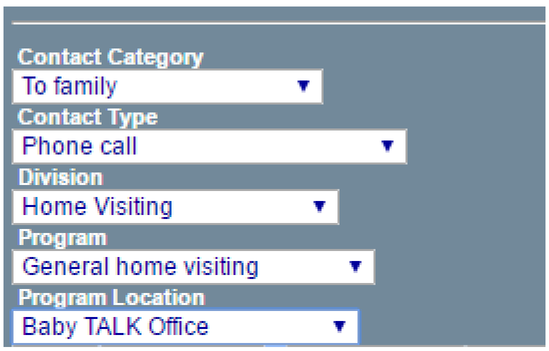
Program Location and Activity are specific to each the agency

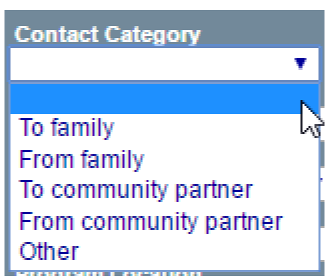
Newborn Encounter

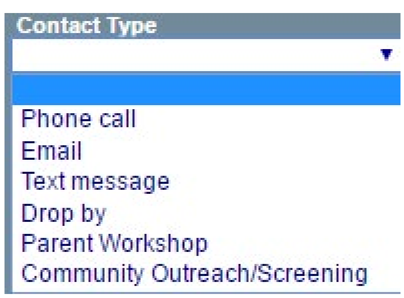


Program location is specific to each agency

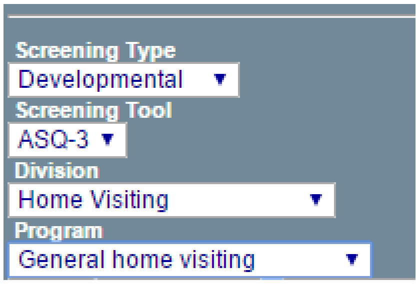
Personal Contact

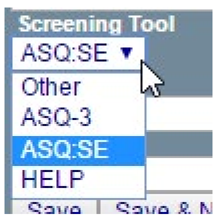






Screening





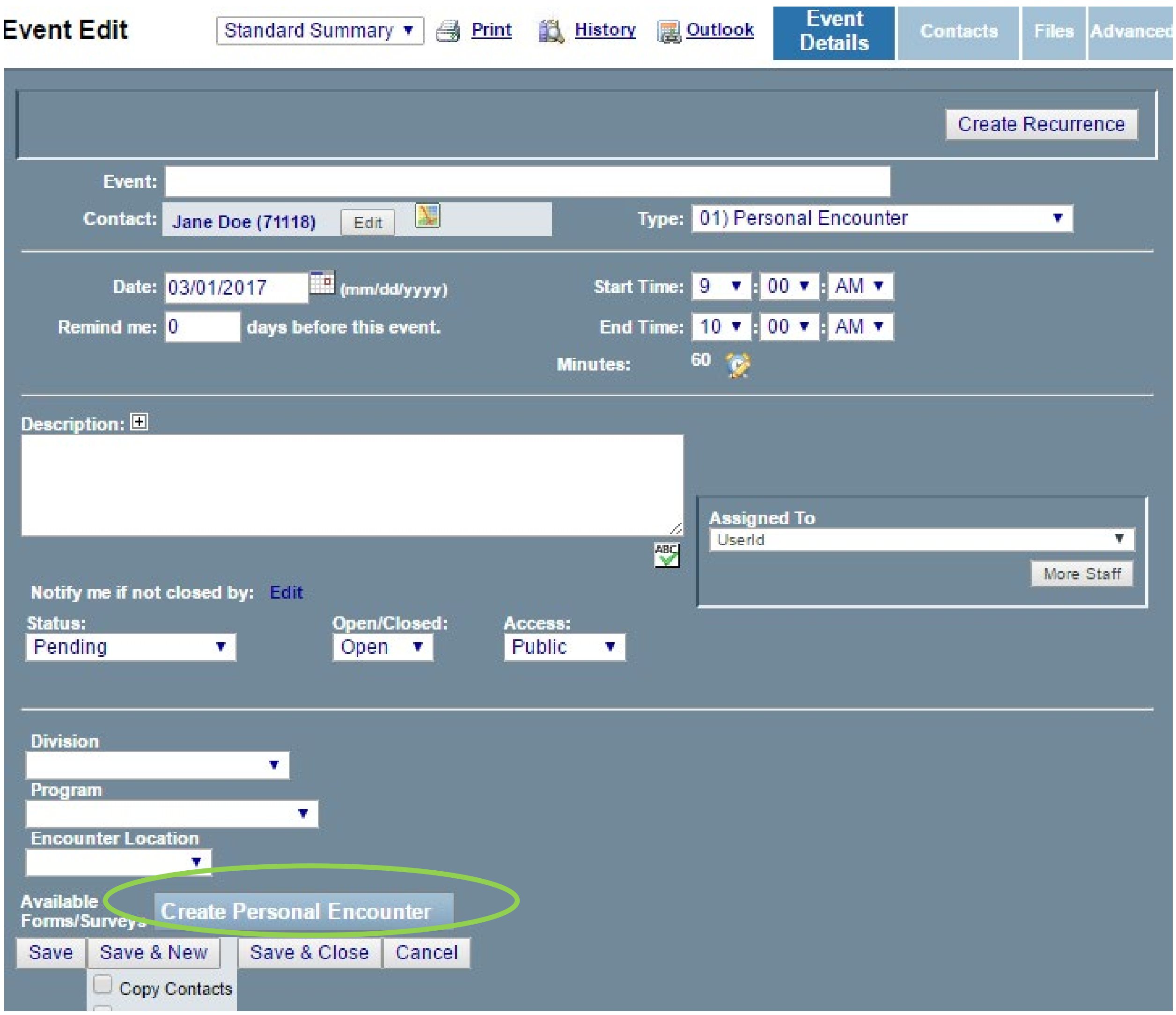
Family Resource Assessment, Family Service Plan (IFSP), Referral, Transition, Screening for Eligibility

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 each contact 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. 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