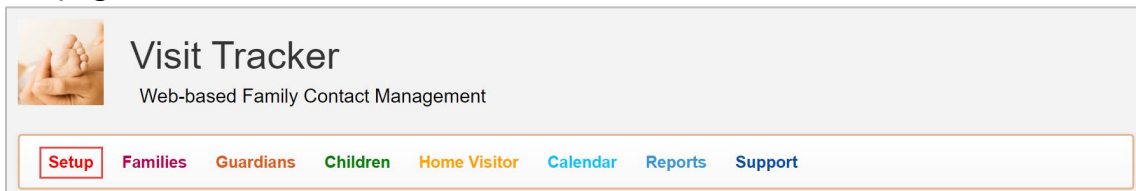


# How to customize Visit Tracker preferences to match HVSA reporting requirements

Main admins and other users who have been granted permissions can customize preferences to streamline data entry and reporting in Visit Tracker. This document provides instructions to ensure that all HVSA-required fields are visible, including those necessary to calculate the Aligned, MIECHV, and Performance-Based Contracting Measures. Your program may need or want to track other elements that are not outlined here (e.g., to meet requirements of other funders or to meet model fidelity requirements).

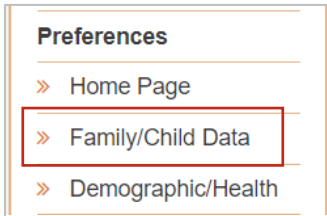
1. While signed in as the main admin or another user who has been given appropriate permissions, click on the “Setup” link in the menu bar at the top of the page.



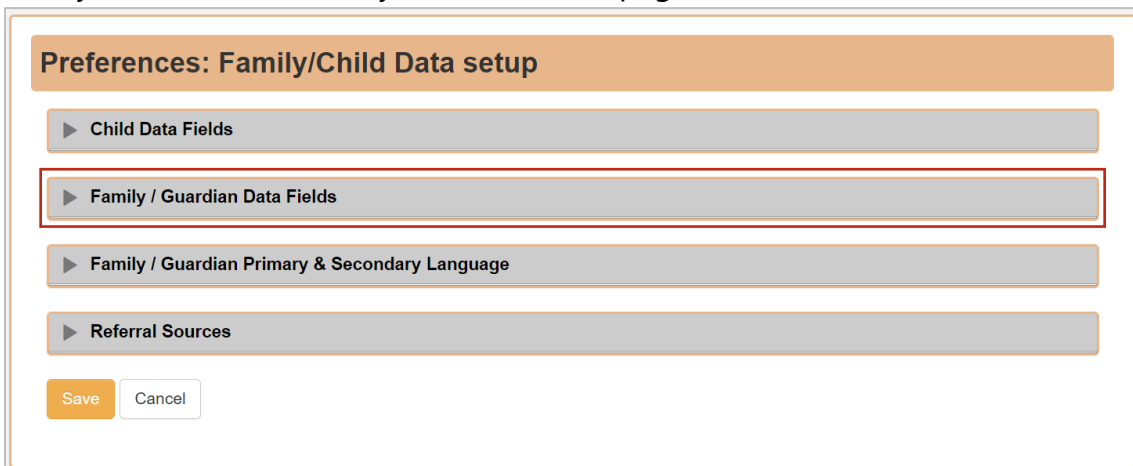
2. After clicking on the Setup link, you'll see a vertical menu on the left side of the page. Each of the Visit Tracker sections that allow for customization are listed under the “Preferences” heading.



3. Under the Preferences heading, click on the "Family/Child Data" link.



4. **Family/Guardian Data Fields:** Click on the "Family / Guardian Data Fields" bar to expand the menu. This section allows you to modify fields seen on the Enter New Family form and that Family/Guardian Data pages.



5. Scroll down to locate the "Child Welfare Consent?" and "Washington Parent Consent?" rows. **Make sure that the box next to "Washington Parent Consent?" is checked** and that the box next to "Child Welfare Consent?" is not checked.

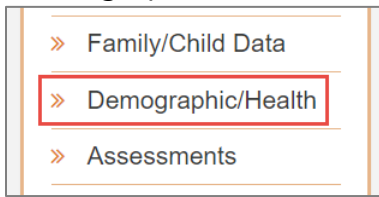


The "Washington Parent Consent?" field is the data entry location to indicate whether a caregiver consented to sharing their personally identifiable information with DCYF and DOH.

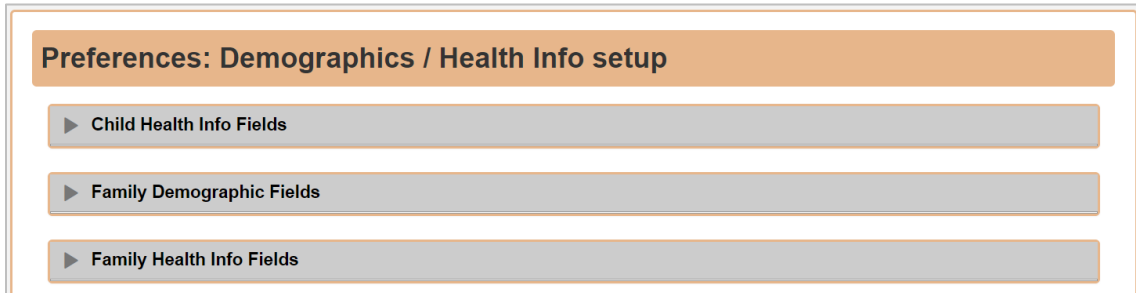
6. Click "Save" at the bottom of the "Family / Guardian Data Fields" section.



- Return to the menu on the left side of the screen and click on the "Demographic/Health" link.



On this page, you may set preferences for the following sections:



- Child Health Info fields:** Click on the "Child Health Info Fields" bar to expand the menu, and make sure that the boxes next to "Child Medical Visits (Health Info and PVR)" and "Breast Feeding Survey (Health Info and PVR)" are checked. Click Save.



These fields allow you to enter data about well-child visits (aligned measure), emergency room visits (MIECHV measure), and breastfeeding (aligned measure).

- Family Demographic fields:** Click on the "Family Demographic Fields" bar to expand the menu.



- a. **MIECHV only** – Within the Family Demographics Fields section, make sure that the box next to “Show MIECHV tracking elements (Priority Population demographics and target child destination field)” is checked. Click save.

Show MIECHV tracking elements (Priority Population demographics & target child destination field)	<input checked="" type="checkbox"/>
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Checking this box ensures that the fields to record MIECHV Priority Population Characteristics appear on the Demographic/Health Info page.

- b. **Optional** – Click on the “Family Demographic Fields” bar to expand the menu. Make sure the box next to “Show Avg Monthly Cash & Non-Cash income?” is checked. Click save.

Show Avg Monthly Cash & Non-Cash income?	<input checked="" type="checkbox"/>
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Enabling this field will allow you to indicate that a family receives TANF. This information is not required, but it is used to determine which families, among those that met a 12-month or 18-month retention milestone, qualify your program for an additional performance payment award.

10. **Family Health Info fields:** Click on the “Family Demographic Fields” bar to expand the menu.

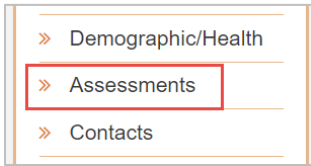
▶ Family Health Info Fields
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- a. **MIECHV only** – Make sure that the boxes next to “Does your agency record Tobacco Use Survey? (Health Info and PVR)” and “Medical & Emergency Room Visits (Health Info and PVR)” are checked.

Does your agency record Tobacco Use Survey? (Health Info and PVR)	<input checked="" type="checkbox"/>
Medical & Emergency Room Visits (Health Info and PVR)	<input checked="" type="checkbox"/>

These fields allow you to enter data needed for the tobacco cessation referrals MIECHV measure and the postpartum care MIECHV measure.

11. **Assessments:** Return to the vertical menu bar on the left side of the screen and click "Assessments."



This section allows you to specify which assessment tools you would like to appear in the "Add Assessment" drop down menu. You may want to limit the options in the drop down menu to include only the assessment tools your program uses. Relevant HVSA-required assessment tools are:

- Parent-Child Interaction – HOME **or** PICCOLO
- Depression Screening – PHQ-9
- Intimate Partner Violence Screening – Relationship Assessment Tool (RAT)

To view the list of assessments that may be included in the drop down menu, scroll down to the table with the headers "Tools," "Show?," and "Default..."

Tools	Show?	Default Next Due Date (months)
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- a. **To enable the I/T HOME and EC HOME parent child assessment tools (required unless your program uses the PICCOLO):** Make sure that the "Show?" boxes are checked next to "Early Childhood HOME (EC HOME)" and "Infant/Toddler HOME (I/T HOME)."

Early Childhood HOME (EC HOME)	<input checked="" type="checkbox"/>	12	
Infant/Toddler HOME (I/T HOME)	<input checked="" type="checkbox"/>	12	

- b. **To enable the PICCOLO parent child assessment tool (required unless your program uses the HOME):** Make sure that the "Show?" box is checked next to "PICCOLO."

PICCOLO	<input checked="" type="checkbox"/>	6	
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- c. **To enable the PHQ-9 depression screening tool:** Make sure that the "Show?" box is checked next to "Personal Health Questionnaire (PHQ-9)."

Personal Health Questionnaire (PHQ-9)	<input checked="" type="checkbox"/>	12	
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- d. To enable the RAT Intimate Partner Violence (IPV) screening tool: Make sure that the “Show?” box is checked next to “Relationship Assessment Tool (RAT).”

Relationship Assessment Tool (RAT)	<input checked="" type="checkbox"/>	12	
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**Note:** The Relationship Assessment Tool (RAT) is also known as Futures Without Violence (Futures) and the Women’s Experiences with Battering (WEB). While each of these names appears in Visit Tracker’s assessments list, we **highly recommend** checking show next to “Relationship Assessment Tool (RAT)” and **NOT** “Futures Without Violence (Futures)” or “Women’s Experiences with Battering (WEB).” The “Relationship Assessment Tool (RAT)” version allows you to enter item-level responses (rather than just a total score) and auto-calculates the total score based on those response, making for simpler and more accurate data entry. If your program has been using the Futures or WEB options, your responses have still been counted toward the intimate partner violence screening aligned measure.

12. **Planning Guide and Personal Visit Record (PVR):** Return to the vertical menu bar on the left side of the screen and click on “PG/PVR.”

» Contacts
» <b>PG/PVR</b>
» Resource Connection

13. Click on the “Preferences: PG/PVR” header to expand the menu.

▶ <b>Preferences: PG/PVR</b>
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14. If you would like to enter data for the aligned early language and literacy and well-child visit measures directly on the PVR, make sure that the “Show?” boxes are checked next to “Literacy Activity Survey on PVR” and “Child Medical Visits (PVR only).”

Literacy Activity Survey on PVR	<input checked="" type="checkbox"/>
Child Medical Visits (PVR only)	<input checked="" type="checkbox"/>

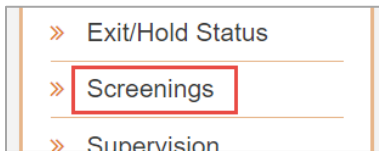
You are not required to enable these fields on the PVR as there are alternate data entry locations for this data in Visit Tracker.

15. **MIECHV only** – If you would like to be able to enter data for the MIECHV tobacco cessation referrals, postpartum care, and safe sleep measures directly in the PVR, make sure that the boxes next to “Does your agency record Tobacco Use Survey? (Health Info and PVR),” “Medical & Emergency Room Visits (Health Info and PVR),” and “Safe Sleep Survey” are checked.

Does your agency record Tobacco Use Survey? (PVR only)	<input checked="" type="checkbox"/>
Medical & Emergency Room Visits (PVR Only)	<input checked="" type="checkbox"/>
Safe Sleep Survey on PVR	<input checked="" type="checkbox"/>

You are not required to enable these fields on the PVR as there are alternate data entry locations for this data in Visit Tracker.

16. **Child Developmental Screening:** Return to the vertical menu bar on the left side of the screen and click on “Screenings.”



17. Under “National Tools,” ensure that the box next to “ASQ-3” is checked.

Screening Tools		
National Tools		
Tool	Category	Show?
ASQ-3	Developmental	<input checked="" type="checkbox"/>

Enabling the ASQ-3 ensures that you are able to choose “ASQ-3 (National)” from the “Screening Tool” drop down menu when entering ASQ-3 results.

Because Visit Tracker makes frequent improvements, some information in this document may be out-of-date. If you have questions about Visit Tracker preferences and HVSA reporting, or you find that areas within this document need to be updated, please kindly reach out to [homevisiting@doh.wa.gov](mailto:homevisiting@doh.wa.gov).