

## How to Document Visits and Encounters in Visit Tracker (Family Spirit)

This document includes instructions for **Family Spirit** programs. Early Steps to School Success (ESSS), Parents as Teachers (PAT), and Steps to Effective Enjoyable Parenting (STEEP) programs should refer to an alternate document specific to the Personal Visit Record (PVR). This document is available on the [Data Collection page](#) of DCYF's Home Visiting Services Account web page.

### How to document a home visit

Documenting a home visit requires two actions. The first is to schedule the visit using the Family Contacts form. The second is to complete a Personal Visit Record (PVR).

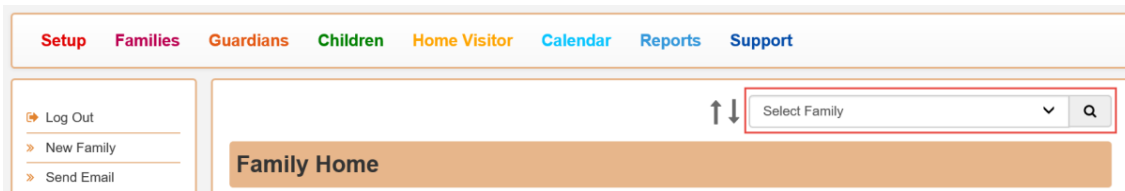


#### Contacts Form

**Includes initial questions about the visit, including:**

- Contact Type
- Contact Date
- Contact Duration

1. Click on the *Families* link in the horizontal navigation bar, and choose the family from the drop down menu.



2. In the left vertical menu, click on "Contacts" under *Family Home*.



3. Click on the "+" sign in the Family Contacts header.



4. An "Add Contact" menu will pop up. Data elements required by the HVSA are outlined in red. The contact type **must** be set to "Private" to indicate that the contact is a home visit.

You may complete the Add Contact form before the visit occurs. After the visit, you must return to the Contacts page and complete a Personal Visit Record (PVR). **A PVR must be completed in order to indicate that the visit actually occurred.**

## Personal Visit Record

Includes questions about the visit, including:




- Visit Duration
- Visit Type

*These are the minimum data elements on the PVR that are required by the HVSA. You may need to complete additional fields to meet model requirements.*

1. To complete a PVR, return to the family's "Contacts" page.



2. The visit you previously scheduled will appear in the "Contacts" table on this page. Click on the word "Private" in the "Type" column to open the PVR form.

Contacts									
Date	Type	Home Visitor	Guardians	Children	Total	0-3	>3	Pre	
4/10/2020	Private	Home Visitor	Primary Caregiver	Born Child	2	2	0	Y	  

3. Each of the required elements to document a home visit are included in the **Part 2: Home Visit Summary** section. Enter Visit Type in the drop-down menu next to the question "How was the home visit conducted?" and Visit Duration in the box next to "Time spent in session (minutes)."

**Part 2: Home Visit Summary**

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**The home visitor should fill out this section AT THE END OF THE VISIT. Please ask participant**

Visit Date 5/24/2022

How was the home visit conducted? In person ▾

Location In person

Enrolled guardian present Phone

Enrolled children present Video

Others present Other

Enrolled children present Born Baby

Others present Select all that apply ▾

Purpose of visit Select all that apply ▾

**Final Thoughts**

Time spent in session (minutes) 90

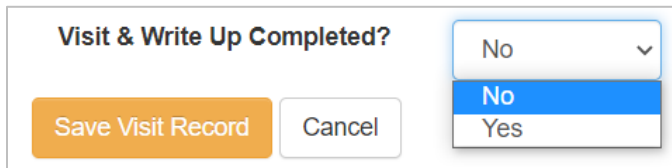
4. There are many other questions on the PVR that you may complete to meet Family Spirit model requirements.
5. When finished, click "Save Visit Record" at the bottom of the page.

**The PVR also includes data entry locations for the following:**






- Breastfeeding survey (used for Aligned Measure 1: Breastfeeding)
- Child medical visits (used for Aligned Measure 3: Well-Child Visits)
- A family member read, told stories, and/or sang songs every day during the past week? (used for Aligned Measure 6: Early Language and Literacy Activities)
- Depression referrals (used for Depression Referrals performance payment measure and the MIECHV Completed Depression Referrals measure)

**Other tips related to home visits and PVRs**

You may use the last question on the PVR, "Visit & Write Up Completed?," to create a visual queue for whether or not a PVR has been completed in the "Contacts" table.



If no is chosen, the "Private" link in the Contacts table on the Family Contacts page will be red. If yes is chosen, the "Private" link will be green. If no PVR has been created, the "Private" link will be blue.

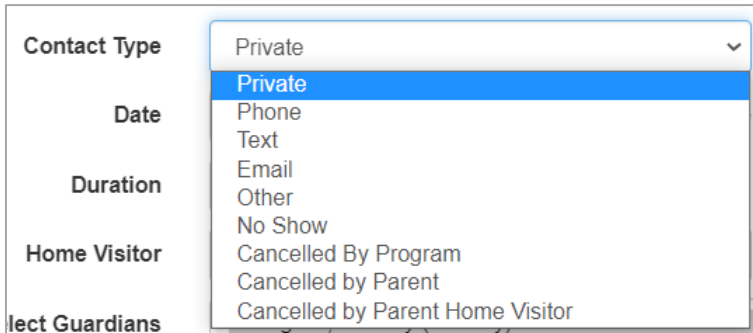
Contacts									
Date	Type	H	No PVR created	Children	Total	0-3	>3	Pre	
5/26/2022	Private	FamSpirit HV	First Last	Twin A Toddler Child n B	3	3	0		  
5/25/2022	Private	FamSpirit HV	First Last	Toddler Child	1	1	0		  
5/24/2022	Private	FamSpirit HV	First Last	Twin A Toddler Child n B	3	3	0		 

**How to cancel a home visit**

1. If a planned visit does not occur, you may indicate that by editing the "contact." Find the row for the contact you want to edit, and click the pencil icon near the right side of the row.




7/26/2020	Private	Home Visitor	Primary Caregiver	Unborn Child	1	1	0	Y	  
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- In the "Edit Contact" menu, expand the drop down list next to "Contact Type," and choose the reason the visit did not occur. The options are "No Show," "Cancelled by Program," "Cancelled by Parent," or "Cancelled by Parent Home Visitor."



- Click Save.

The change will be reflected in the "Contacts" table on the Family Contacts page.

7/2/2020	Cancelled by Parent	Home Visitor	Primary Caregiver	Born Child	1	1	0	  
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## How to document an encounter

During the covid-19 pandemic, the HVSA is using encounters to determine whether a family was engaged during a specified period of time. Encounters are documented in 2 ways depending on the encounter type.

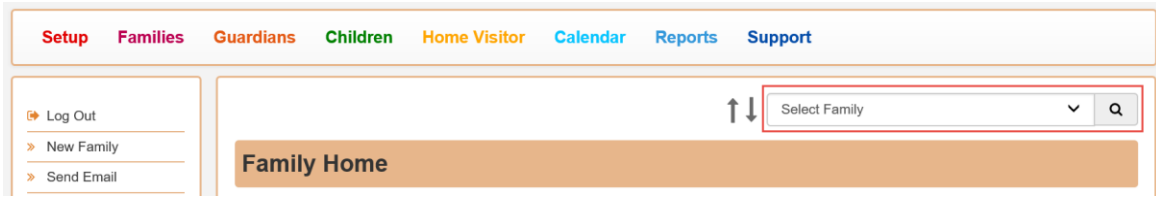
If you are documenting a phone call, text, e-mail, or "other" type of contact (e.g. porch drop off), use the **Contacts form**. If you are documenting a family's participation in a group connection, use the **Group Connections form**.

### Phone calls, texts, e-mails, or other

Contacts Form

- Contact Type
- Contact Date
- Contact Duration

1. Navigate to the Family Home page by clicking on the “Families” link in the horizontal navigation bar and choosing the family from the drop down menu.



2. Click on “Contacts” in the left vertical navigation bar.



3. Click on the “+” sign in the Family Contacts header.



- An "Add Contact" menu will pop up. Data elements required by the HVSA are outlined in red. To document an encounter, the contact type must be set to "phone," "text," "email" or "other." Enter the Contact Type, Date, and Duration, then click "Create."

**Add Contact**

**Contact Type** Phone

**Date** 09/20/2021

**Time** 1:00 PM

**Duration** 10 minutes.

**Home Visitor** Home Visitor

**Select Guardians**  
(ctrl + click for multiple or Command Key + click for multiple)  
Caregiver, Primary (Primary)  
Caregiver, Additional  
SeperateHousehold, AdditionalCaregiver

**Select Children**  
(ctrl + click for multiple or Command Key + click for multiple)  
Child, Born (Active)  
Child, Unborn (Active)

**Location** Location

**Recurring Event?**  No  Yes

**Notes**

**Create** **Cancel**

## Group Connections

Documenting a group connection requires two steps. The first step is to schedule the group connection using the Add Group Contact form. The second is to complete a Group Connection report.

**Schedule the Group Connection  
using the Add Group Contact  
Form**



**Document the Group  
Connection using the Group  
Connections Attendance Form**

## Add Group Contact Form

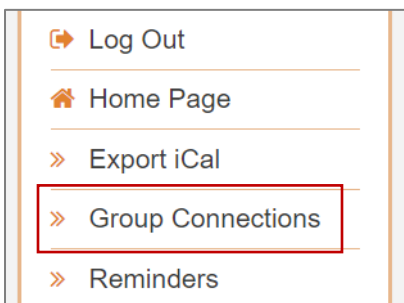
### Includes initial questions about the visit, including:

- Group Connection Date
- Group Connection Duration

1. Navigate to the Calendar page by clicking on the "Calendar" link in the horizontal navigation bar.



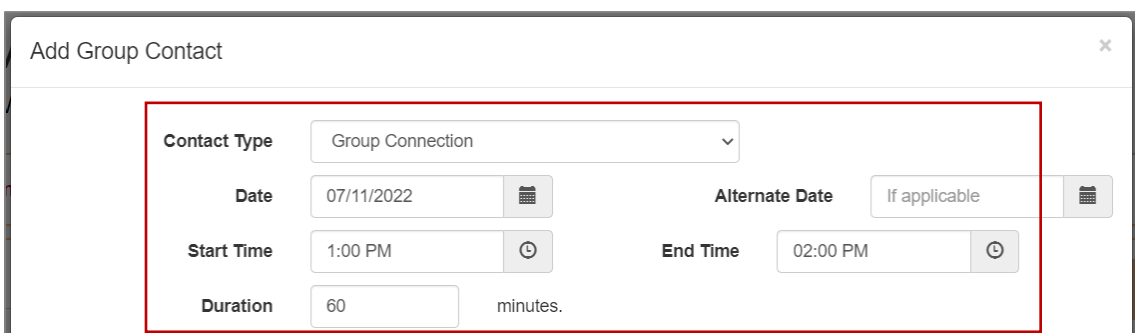
2. Click on Group Connections in the vertical navigation bar on the left side of the page.



3. Click the + sign in the Group Connections header.




4. Fill in the date, the start time and the end time. The duration field will automatically populate with the number of minutes based on the start and end times.

A screenshot of a web form titled 'Add Group Contact'. The form contains several fields: 'Contact Type' (a dropdown menu set to 'Group Connection'), 'Date' (a text field with '07/11/2022' and a calendar icon), 'Alternate Date' (a text field with 'If applicable' and a calendar icon), 'Start Time' (a time picker set to '1:00 PM'), 'End Time' (a time picker set to '02:00 PM'), and 'Duration' (a text field with '60' and the unit 'minutes'). A red rectangular box highlights the 'Contact Type', 'Date', 'Start Time', 'End Time', and 'Duration' fields.



5. Fill in the rest of the form as applicable, and click “Create and Close.” Parents as Teachers programs may need to click “Continue Plan” to complete additional fields and then click “Create and close.”



A horizontal row of three buttons: an orange button labeled "Create and close", a blue button labeled "Continue Plan", and a white button with a grey border labeled "Cancel".

## Group Connections Attendance Form

### Includes initial questions about the visit, including:

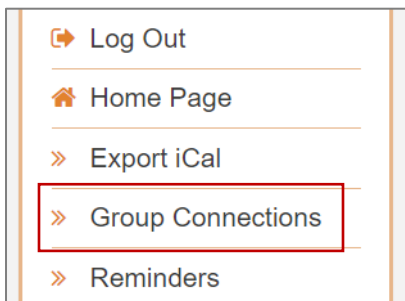
- Group Connection Date
- Group Connection Duration

6. After the group connection has occurred, return to the calendar page by clicking on the “Calendar” link in the horizontal navigation bar.



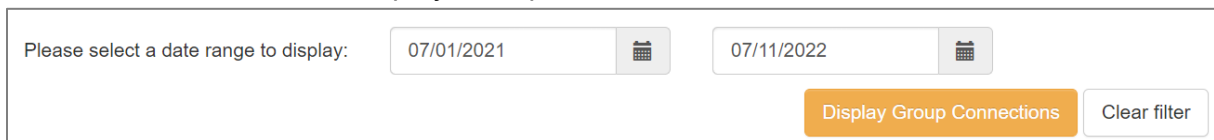
A horizontal navigation bar with several links: "Setup", "Families", "Guardians", "Children", "Home Visitor", "Calendar", "Reports", and "Support". The "Calendar" link is highlighted with a red rectangular box.

7. Click on Group Connections in the vertical navigation bar on the left side of the page.



A vertical navigation bar with several menu items: "Log Out", "Home Page", "Export iCal", "Group Connections", and "Reminders". The "Group Connections" item is highlighted with a red rectangular box.

8. Select a date range that includes the date of the Group Connection you want to document and click “Display Group Connections.”



A form for selecting a date range. It includes the text "Please select a date range to display:" followed by two date input fields. The first field contains "07/01/2021" and the second contains "07/11/2022". Below the date fields are two buttons: "Display Group Connections" (orange) and "Clear filter" (white with grey border).

9. Click on the "Attendance" link next to the Group Connection you want to document.

Date	Time	Meeting Description	Plan	Attendance	Record		
7/11/2022	1:00 PM						

10. Check the boxes next to the families that attended the Group Connection.

Group Connections Attendance

**INCLUDE:** Active Always Included |  Wait List |  Mailing Only |  Recruit |  Inactive / On Hold

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A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
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\*Alphabetized by Family Name

**Anderson**

- Anderson, Neo (Primary)
- Smith, Lindsey
- Anderson, Sandy
- Anderson, Prenatal

**blaze**

- blaze, blade (Primary)
- blade, crusher

**bobby smith**

- smith, jane (Primary)
- smith, bobby

**family**

- family, adams (Primary)
- family, adams jr
- family, candy

**last**

- last, name (Primary)

**martinez**

- martinez, maria (Primary)
- martinez, annalecia

11. Click "Save and Close."

Save and Close

Cancel

Completing these steps will indicate that the families checked above received an encounter on the date of the Group Connection.

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