MARC Head Start

ChildPlus Family Services Procedure Manual

Revised 7/30/2018

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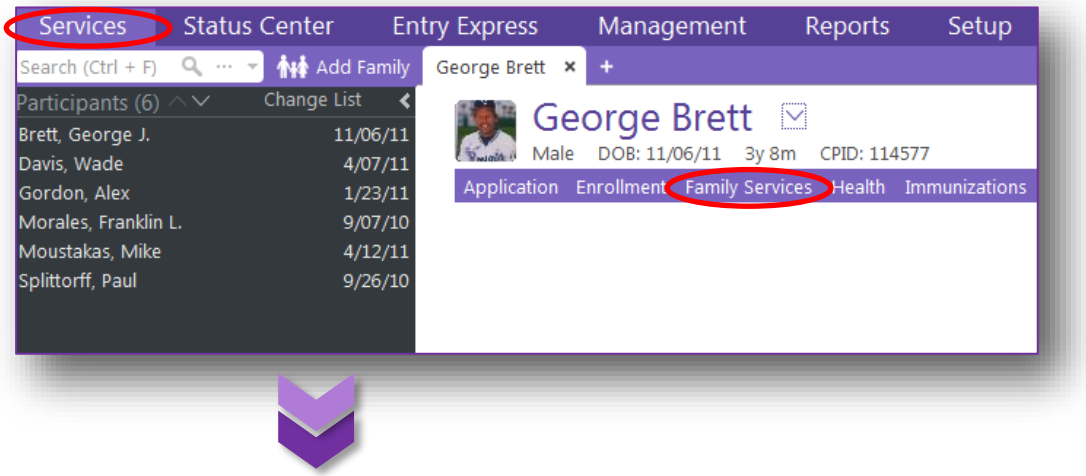
Entering a Family Assessment into ChildPlus

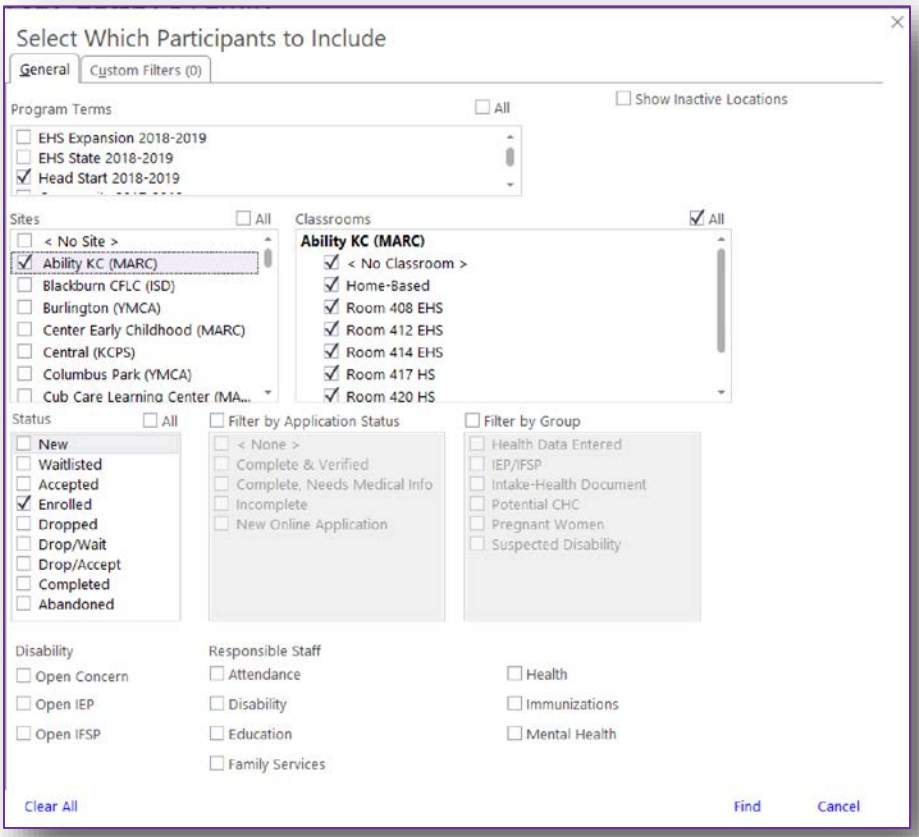
When entering a Family Assessment into ChildPlus, start by clicking on the **Services** tab and selecting or searching for a participant. Click the **Family Services** section.



Selecting a Participant

Make the appropriate selections in the following categories to filter the results.

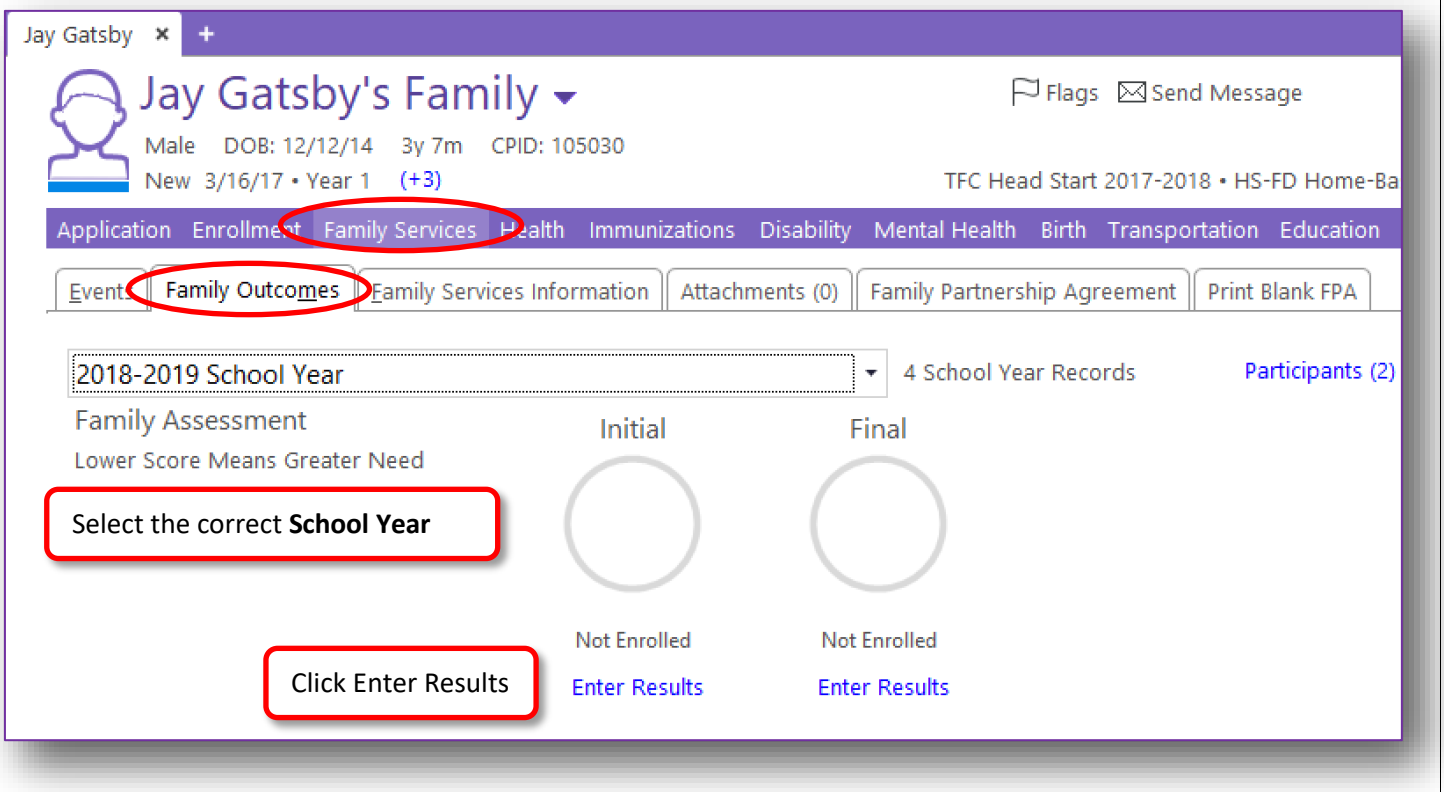
1. Click Change List
2. **Select a program term**: The program term for the current assessment being entered
3. **Sites**: All site locations that may hold a participant/family on your caseload
4. **Classrooms**: Any classroom that may hold a participant/family on your caseload
5. **Status**: Select any applicable status (if uncertain of participant status, select all)
6. **Group**: Leave all groups blank



Click the "**Find**" button

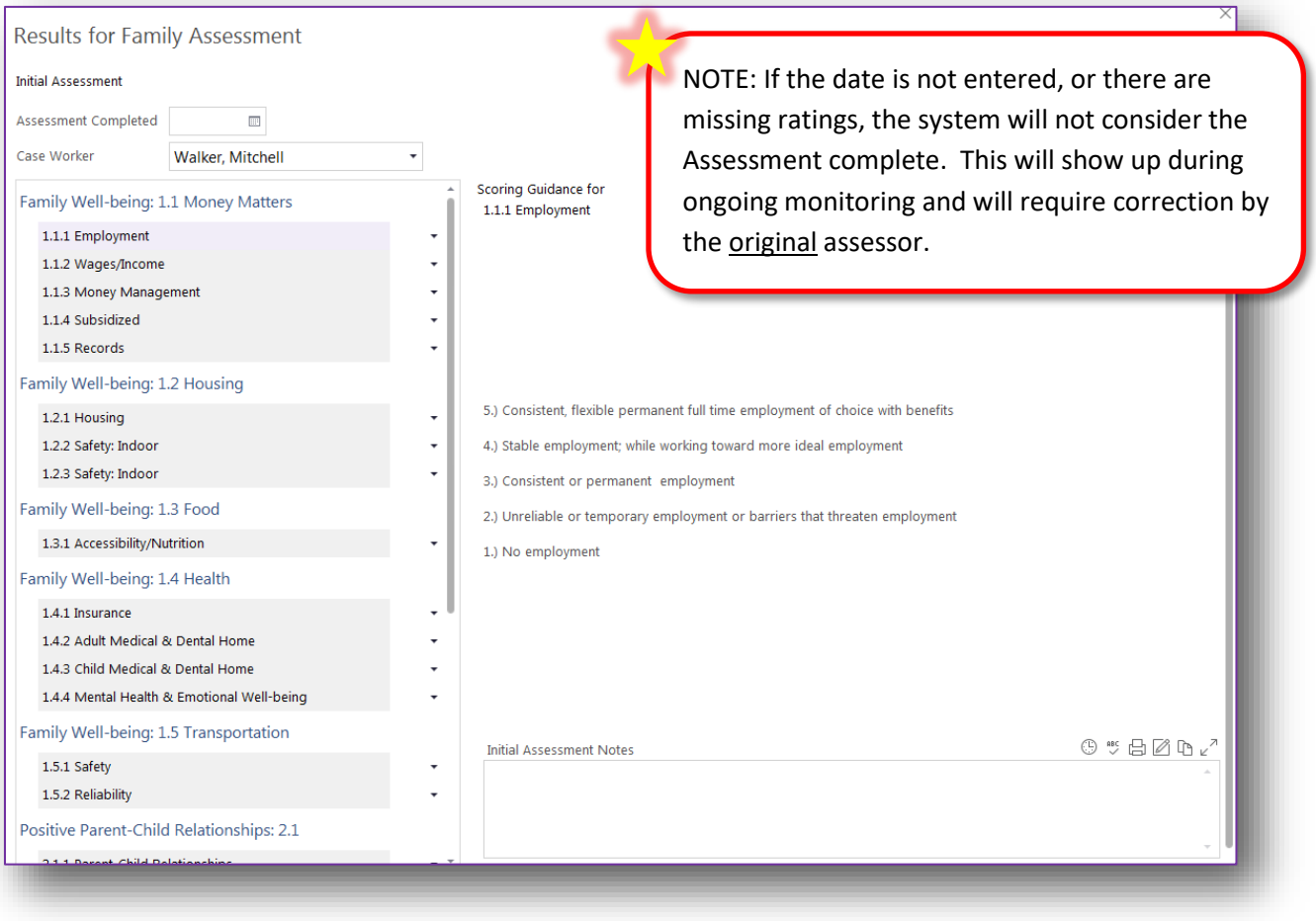
Entering the Assessment

Click on the **Family Services** section, then the **Family Outcomes** tab

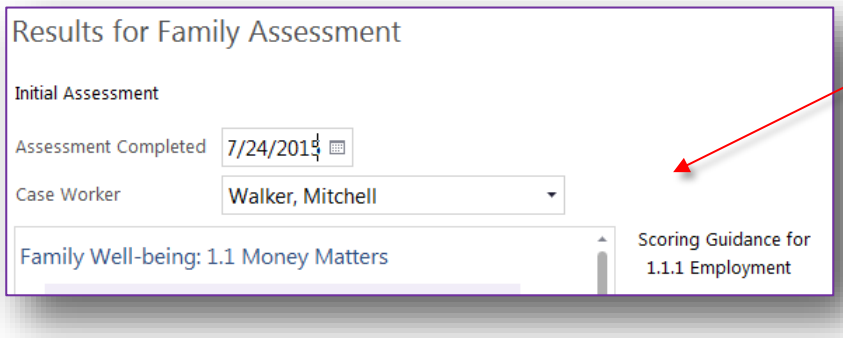


The following fields must be entered for ChildPlus to consider the Assessment Complete.

1. **Assessment Completed**: The date the assessment was completed with the family
2. **Case Worker**: The individual who completed the assessment with the family
3. **Rating**: All ratings must be completed
4. **Initial or Final Assessment Notes:** Enter the S.O.A.P note documentation of the completion of the assessment.
    a. This should include some clear ideas that document why the ratings were chosen

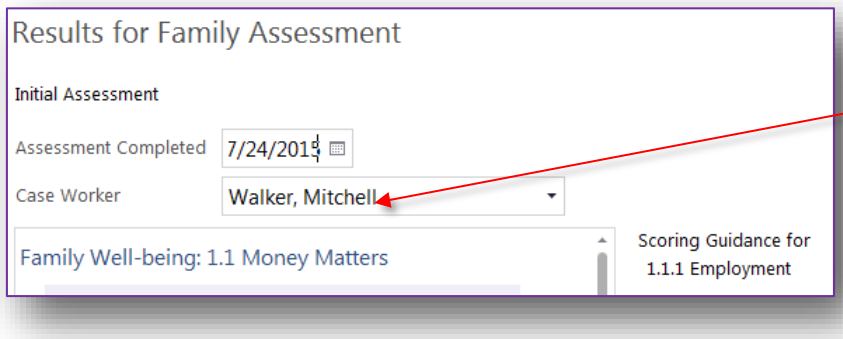


Selecting the Date



Type in the date, or select the appropriate date from the drop down

Selecting the Case Worker

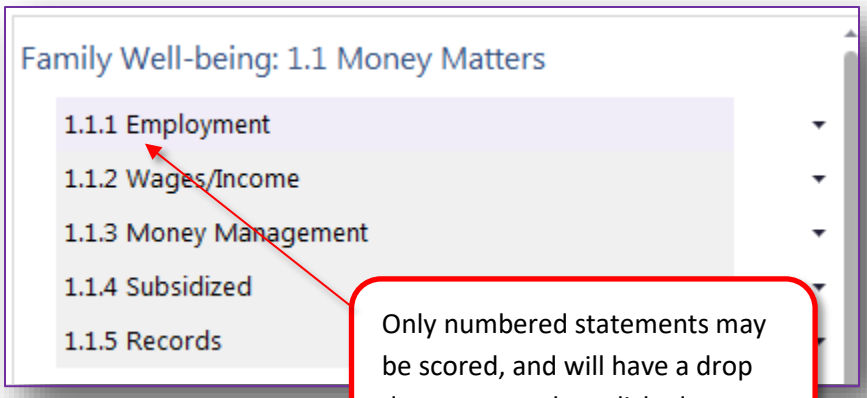


Click on the field, and select the name of the assessor from the drop down list

If the case worker field does not already contain your name, and the family is on your caseload, you **MUST** update the family caseworker with your name in ChildPlus.

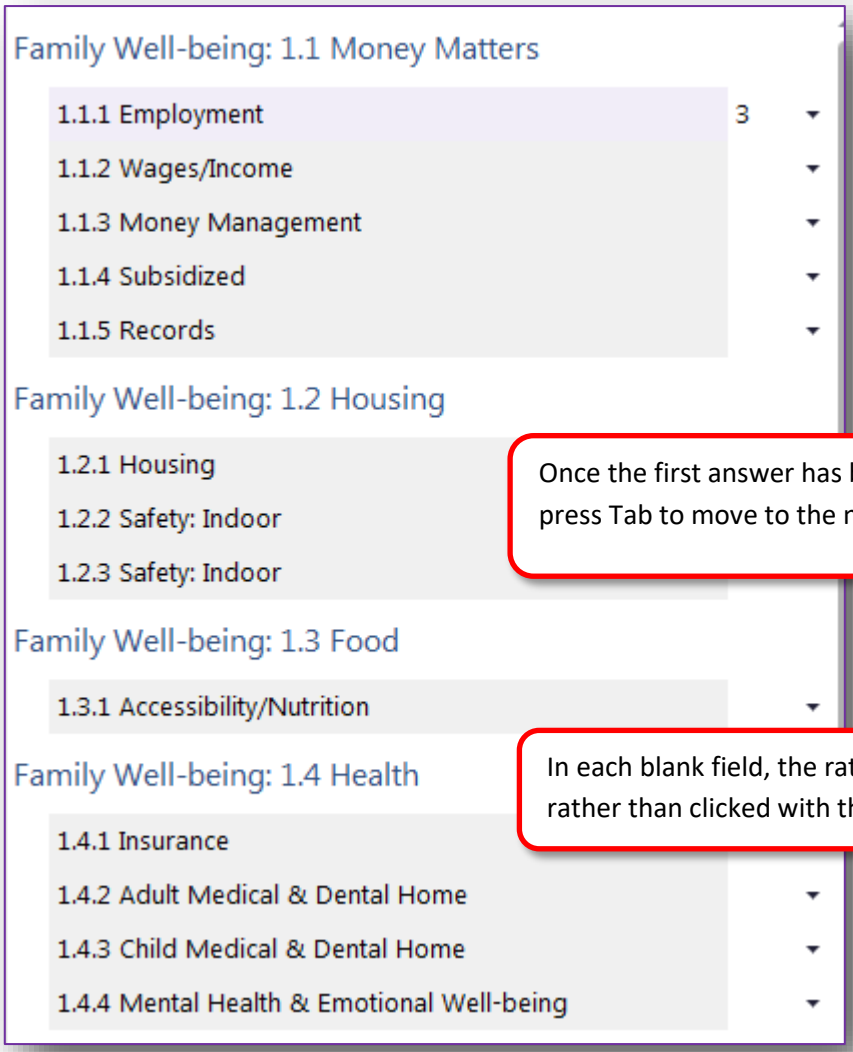
If you are entering the data for someone else that conducted the assessment, use their name here.

Scoring the Assessment



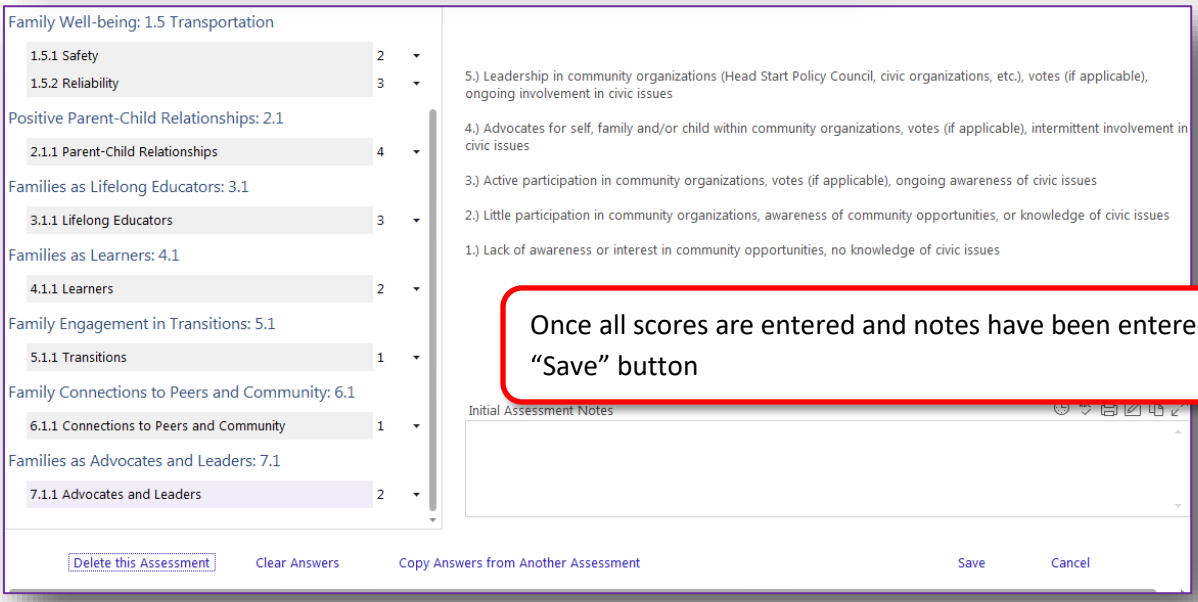
Only numbered statements may be scored, and will have a drop down menu when clicked on.

Select the level from 1-5 based on the categories found in the Form 7000 Family Assessment



Once the first answer has been entered, click on the next field, or press Tab to move to the next field.

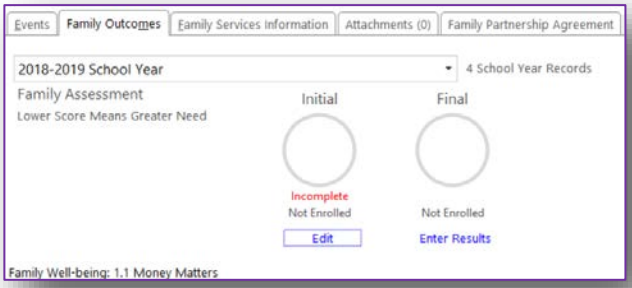
In each blank field, the rating number may be typed on the keypad rather than clicked with the mouse. This saves a lot of time!!



Once all scores are entered and notes have been entered, click the "Save" button

The assessment is now finished!

Making Corrections

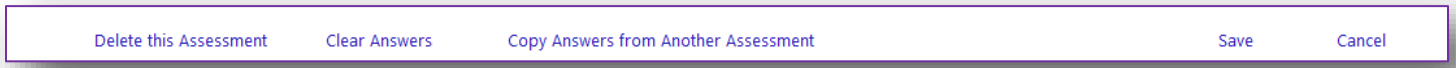


If the "Save" button has already been clicked, simply make any changes by clicking the Edit button and correcting any inaccurate or missing ratings as directed above. Click the "Save" button again to save the new responses.

If the "Save Changes" button has not been clicked, click the "Clear Answers" to remove any changes done since the most recent save.

Any changes to an Assessment be documented and reflected reflect why the changes were made.

If the assessment record needs to be deleted, click the "Delete this Assessment" button. WARNING: this deletes ALL information entered into the assessment and will require starting again from the beginning.



If the enrolled child is a member of more than one family (Foster, joint custody, etc.) choose the most appropriate family to assess. An assessment may be completed on both families if applicable.

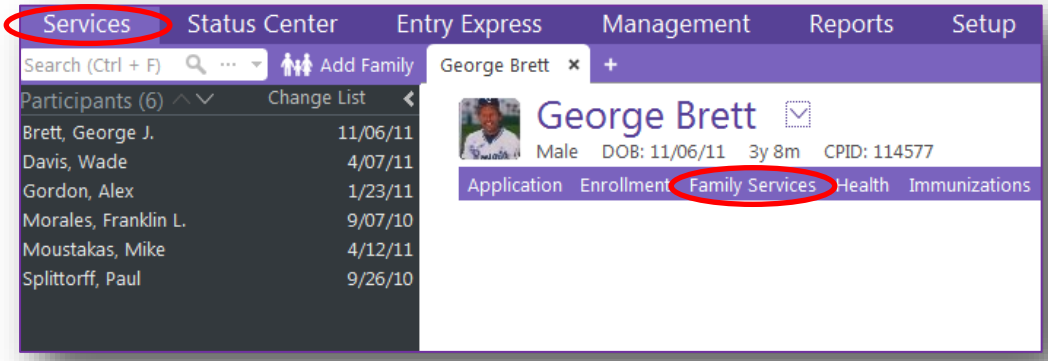
If only one family is assessed, contact your programs or grantee Family Engagement lead to mark the non-assessed family as completed within ChildPlus.

If the family has children enrolled in more than one program, the family service worker from one program is required to contact the family service worker at the other program to coordinate the assessment completion process.

If the family is shared between a Home Based and Center Based program, the Home-Based Family Service Worker is responsible for completing the Family Assessment.

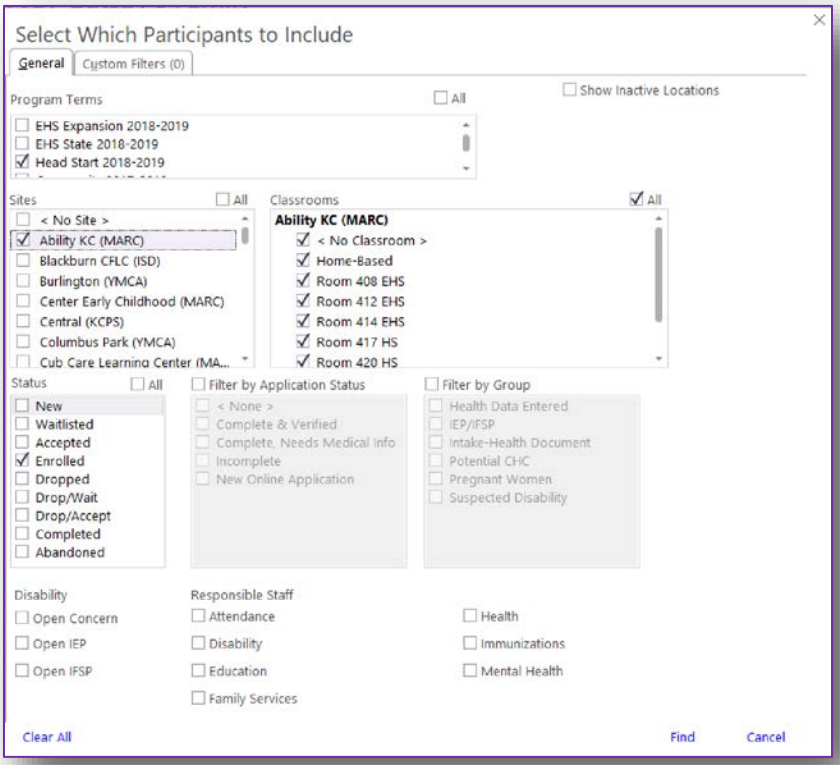
Entering Family Service Events and PIR Information into ChildPlus

When entering a Family Service Event or PIR information into ChildPlus, start by clicking on Services, selecting or searching for a participant and clicking the ***Family Services*** section.



Selecting a Participant

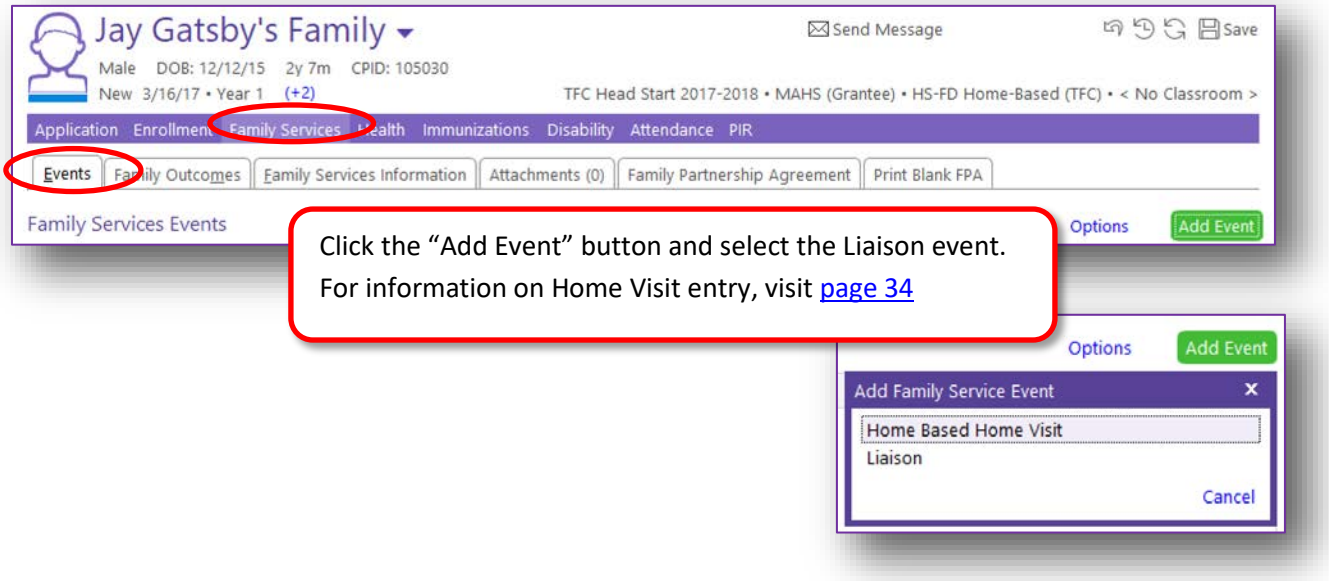
Make the appropriate selections in the following categories to filter the results.



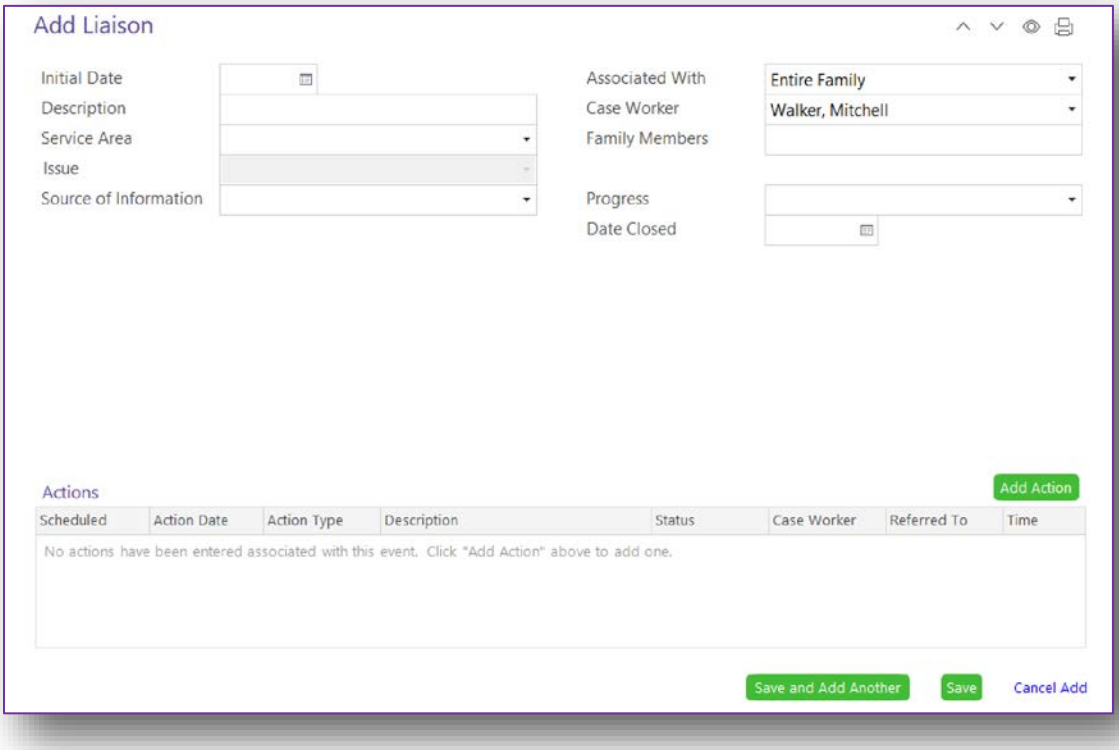
1. Click Change List
2. **Select a program term**: The program term for the current assessment being entered
3. **Sites**: All site locations that may hold a participant/family on your caseload
4. **Classrooms**: Any classroom that may hold a participant/family on your caseload
5. **Status**: Select any applicable status (if uncertain of participant status, select all)
6. **Group**: Leave all groups blank

Click the "**Find**" button

Entering Event Details



Every field must be completed for each event. Proceed through the manual for instructions for each field.



Each event will remain open for an entire program year. For example, there will be a single event for attendance for the entire program year. This event will not close until the end of the year, and all progress will be tracked under actions.

Determining Event Type

Liaison:

This event type is used once per program year **for each content area**. This would include the Disability, Education, ERSEA, Family Engagement (Not Family Assessment or Partnership process), Health, Mental Health, and PIR content areas. This event is used for work with families, including communication that supports this work. For instance, PIR referrals, Mental Health referrals, 6-month transitions, and attendance would be **some** of the items documented under Liaison.

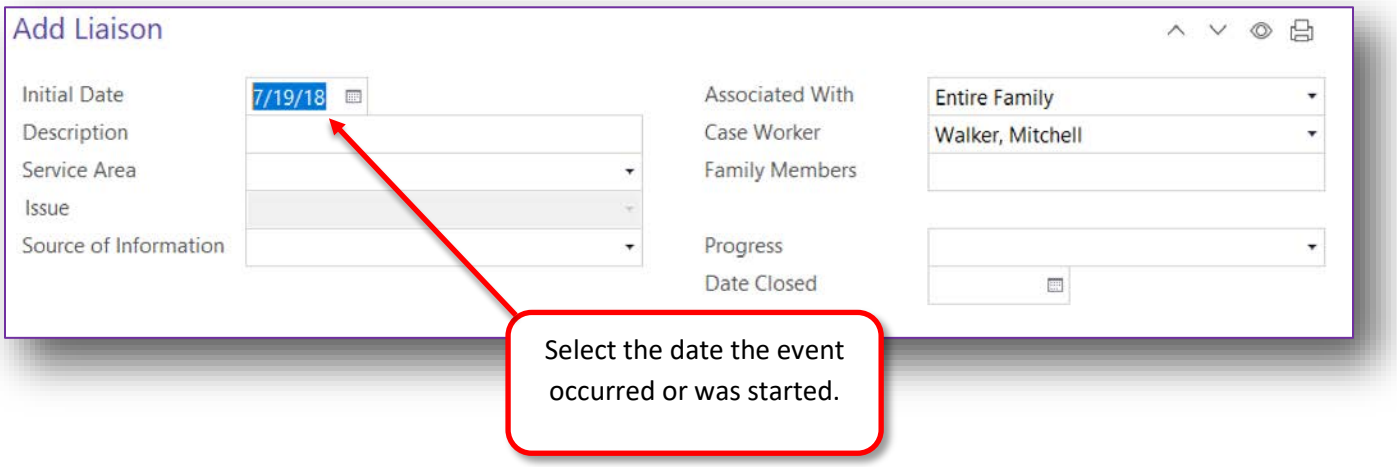
Home Based Home Visit:

This event type is only used to track Home Based Home Visit participation and attendance. There should be a Home Based Home Visit Event Type entered for each month.

Communication Log:

This event type is automatically added to each family and is the **only** Event Type which carries over from year to year. There will **only ever be one** Communication Log event for each family. Information entered here would be for communication that **is not related to** support for families and is typically one-time communication. For instance, if a child fell on the playground and had a minor injury that required a phone call to a parent, it could be documented in this area. This is the **only** event type that will be automatically added to every participant's record. Actions may be added to this event on an ongoing basis.

Initial Date

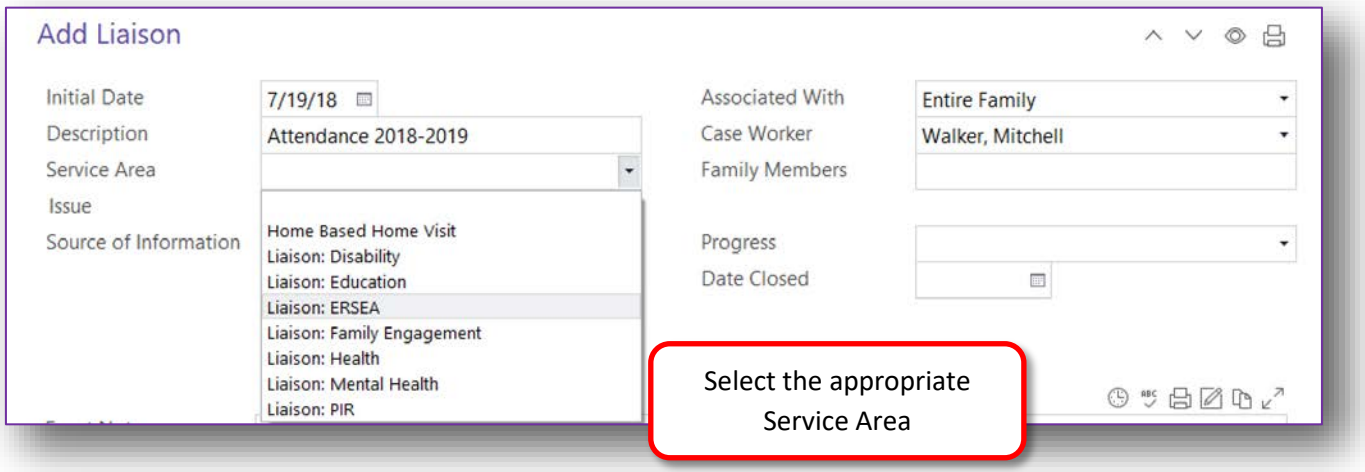


Description

Descriptions for each event should be filled using the following list. Descriptions should be followed exactly.

- Home Based Home Visit (Month)
  - Ex. Home Based Home Visit August 2018
- Disability (Year)
  - Ex. Disability 2018-2019
- Education (Year)
  - Ex. Education 2018-2019
- Family Engagement (Year)
  - Ex. Family Engagement 2018-2019
- Health (Year)
  - Ex. Health 2018-2019
- Mental Health (Year)
  - Ex. Mental Health 2018-2019
- PIR (Year)
  - Ex. PIR 2018-2019

Service Area



Determining Service Area

Each Service area corresponds to a different content area. Select the Service Area that most closely matches the item you are entering.

*****As a rule of thumb when entering a service area, look first at entering the documentation in the Liaison: PIR service area. If the documentation is not in regard to a PIR item, or you've already documented that particular PIR item for the year then look at documenting in the service area corresponding service area. If the documentation doesn't fit into any of those, then document in the Liaison: Family Engagement service area.*****

Liaison: PIR:

Use this Service Area when documenting work related to the PIR content area. For example, documenting a PIR Services Received such as Crisis Assistance or Asset Building Services. Remember, Services Received should only be marked yes if the family has received the service.

Liaison: Disabilities:

Use this Service Area when documenting work related to the Disabilities content area. For example, documenting attending an IEP meeting to support a parent.

Liaison: Education:

Use this Service Area when documenting the transition from EHS to HS, or HS to Kindergarten.

Liaison: ERSEA:

Use this Service Area when documenting the child attendance.

Liaison: Health:

Use this Service Area when documenting work related to the Health content area that **is not** captured in the Portrait of a Healthy Child process. For example, documenting a referral for a parent to get glasses.

Liaison: Mental Health:

Use this Service Area when documenting work related to the Mental Health content area. For example, supporting the parent at an intervention meeting.

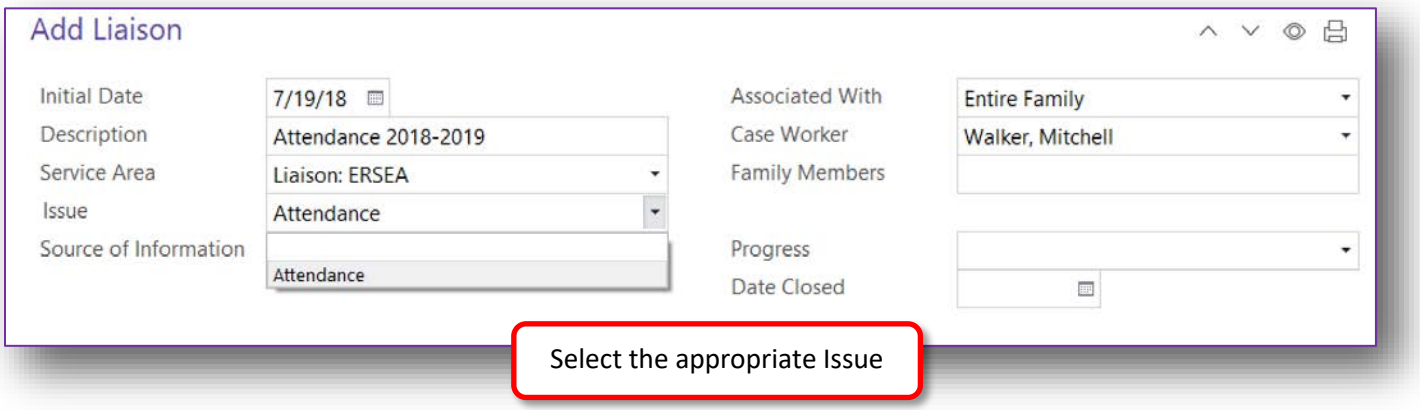
Liaison: Family Engagement:

Use this Service Area when documenting referrals which take place **outside of the FPA goals process**. For Example: A referral to BikeWalkKC

Home Based Home Visit:

Use this Service Area when documenting home visits for a Home-Based program only.

Issue



Determining Issue

Each Service Area has a specific set of Issues that are only available when the correct Service Area has been selected. If the Issue for the event being entered is not found, **reassess the Service Area selected**.

Examples of Service Areas and matching Issues

Home Based Home Visits

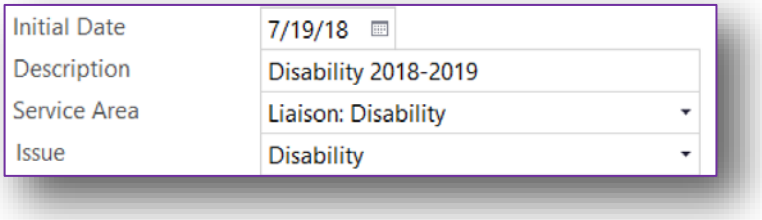
See Home Based Home Visit Attendance Documentation for instructions

Disability

Event: Liaison

Service Area: Disability

Issue: Disability

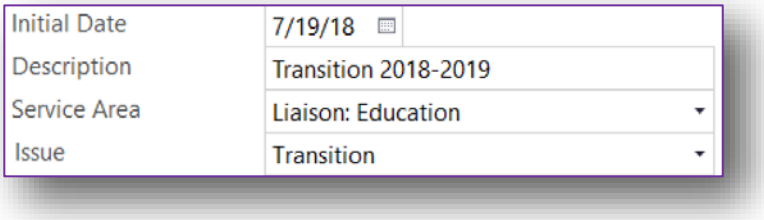


Education

Event: Liaison

Service Area: Education

Issue: Transition

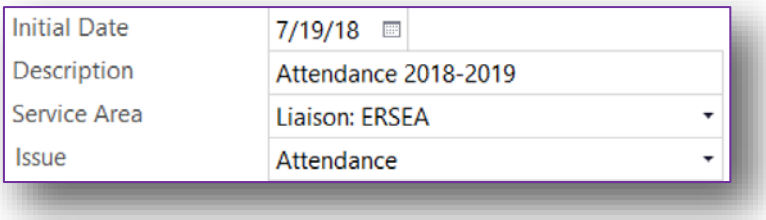


ERSEA

Event: Liaison

Service Area: ERSEA

Issue: Attendance

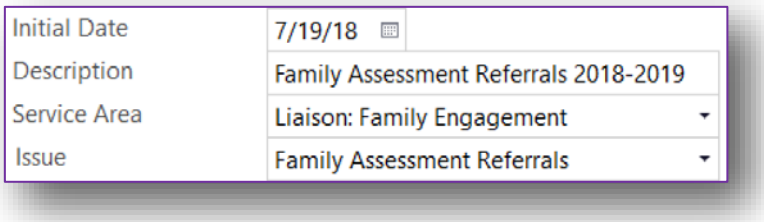


Family Engagement

Event: Liaison

Service Area: Family Engagement

Issue: Referrals

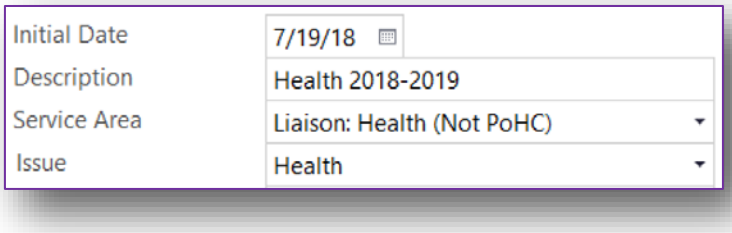


Health

Event: Liaison

Service Area: Health

Issue: Health

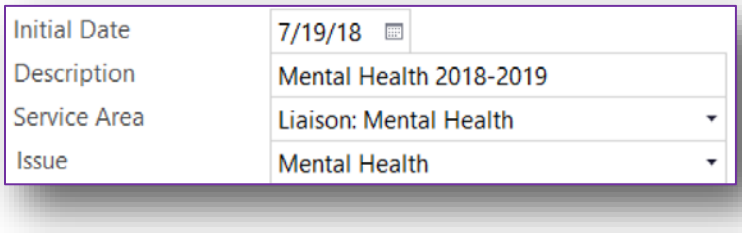


Mental Health

Event: Liaison

Service Area: Mental Health

Issue: Mental Health

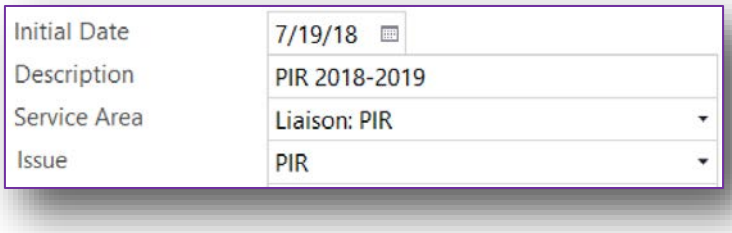


PIR

Event: Liaison

Service Area: PIR

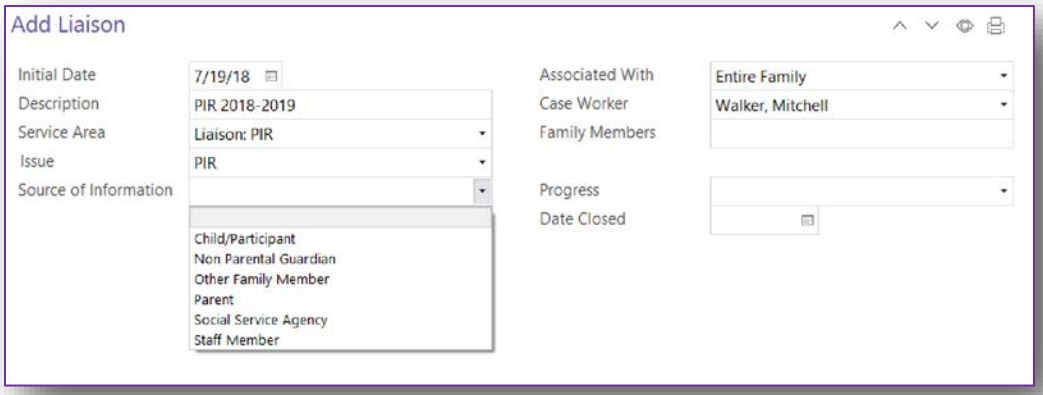
Issue: PIR



Remember: Case noting occurs in the action for each event. It is important to include detailed information in each action. See Adding an Action for more detailed instruction.

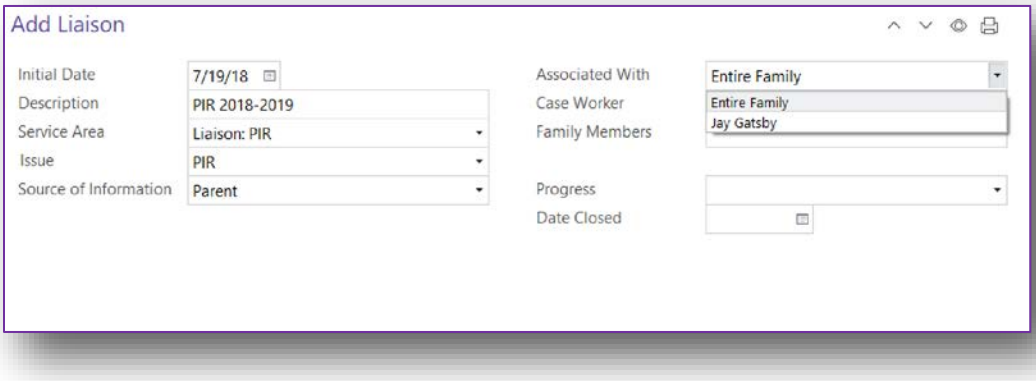
Source of Information

Select the appropriate individual from the drop-down menu. This will be the person who shared the information.



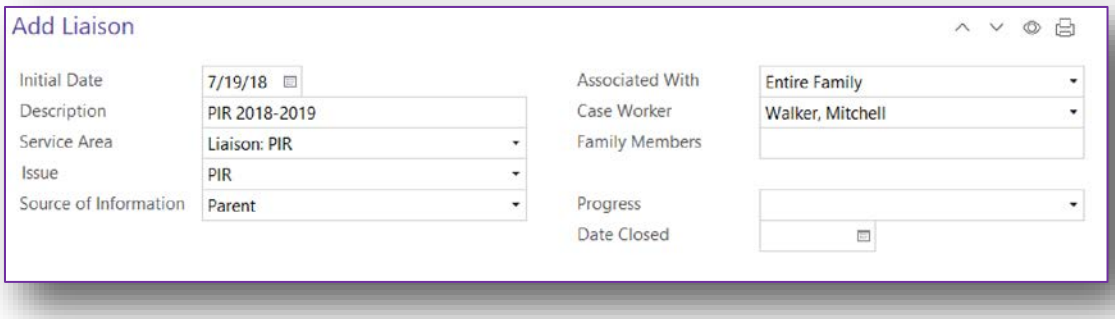
Associated With

Select whether this event is associated with an individual participant, or the entire family. The Liaison event default to associated with the entire family.



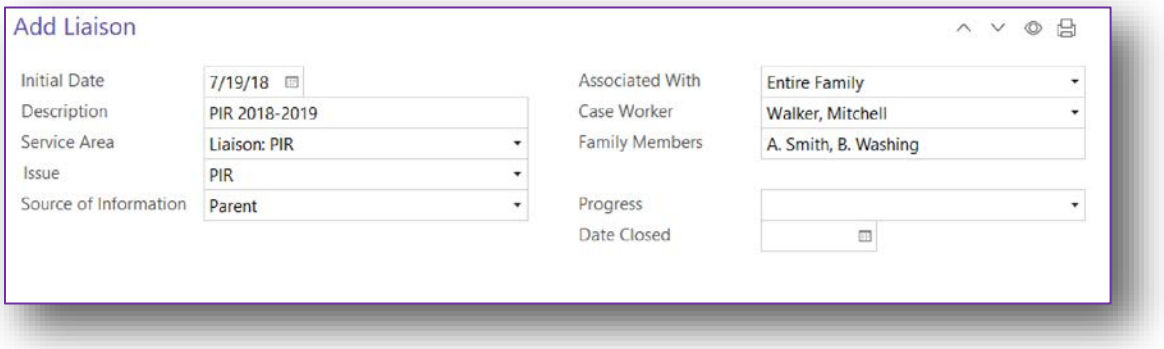
Agency Worker

Select the appropriate Agency Worker from the drop-down menu. This will be your name and will auto populate if the case worker field is completed in the Family Information section.



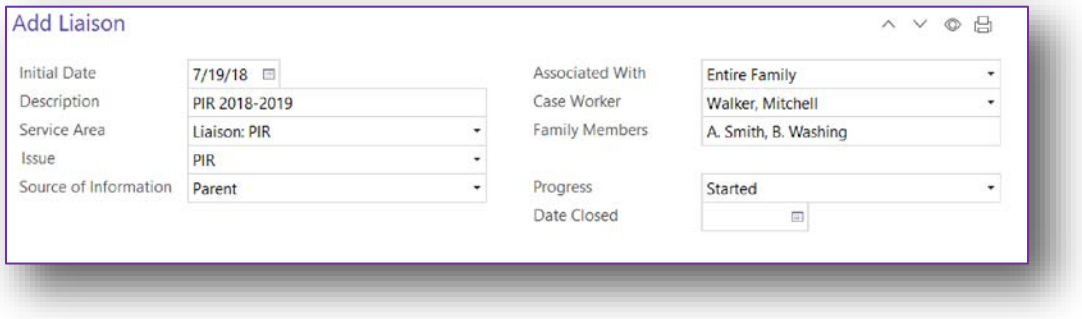
Family Members:

Type in the family members involved in the event. This is a limited text field. If there are many names, abbreviations may be necessary, and all names may not fit.



Progress

Select the appropriate level of completion from the drop-down menu. Events should remain open for the entire year. When the program term has ended, or when the event is truly completed then the progress may be changed to "Completed". For example, a Transition event might be "Completed" in April, because the child transitioned from EHS to HS that month. However, the Attendance event would remain open until the program term is over, and records are being cleaned up.

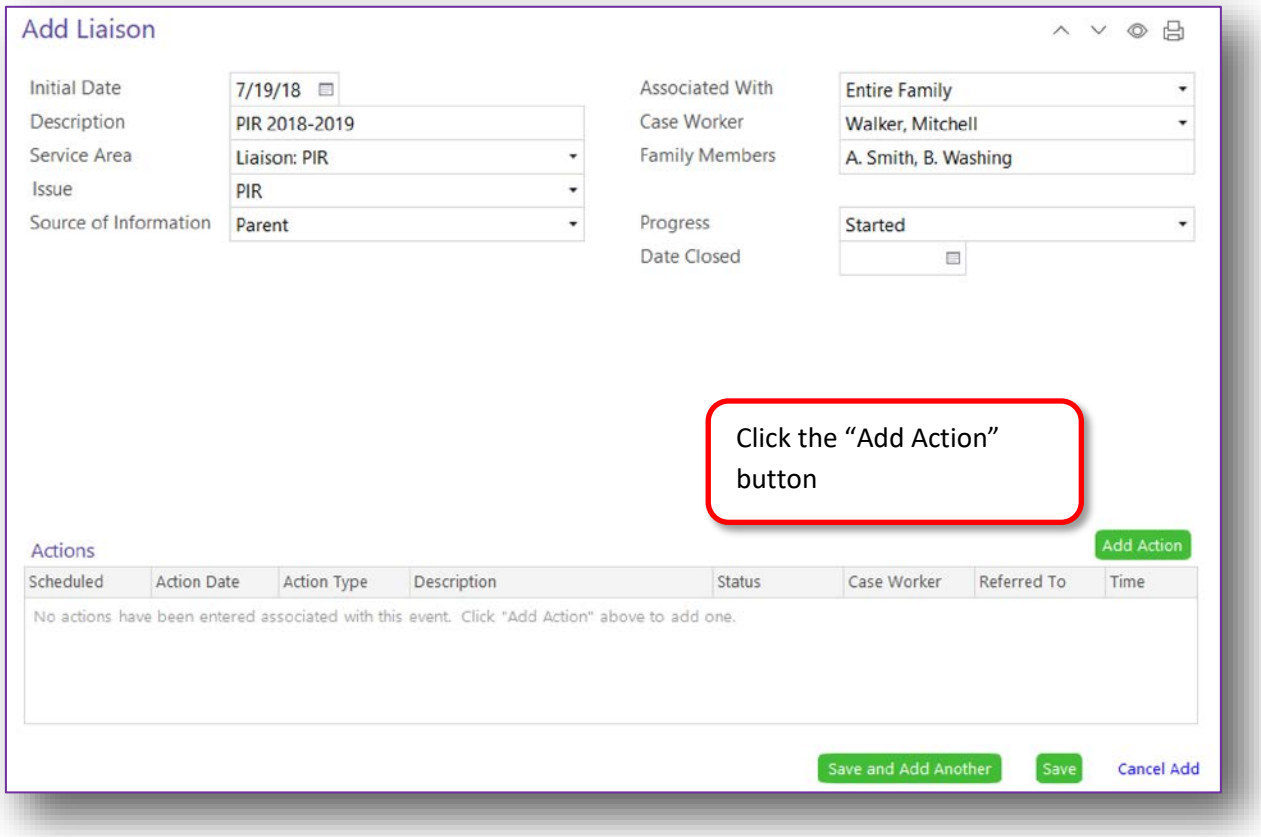


Date Closed

Type or choose from the drop down the date that the event was completed. If the event has not yet been completed, leave this field blank.

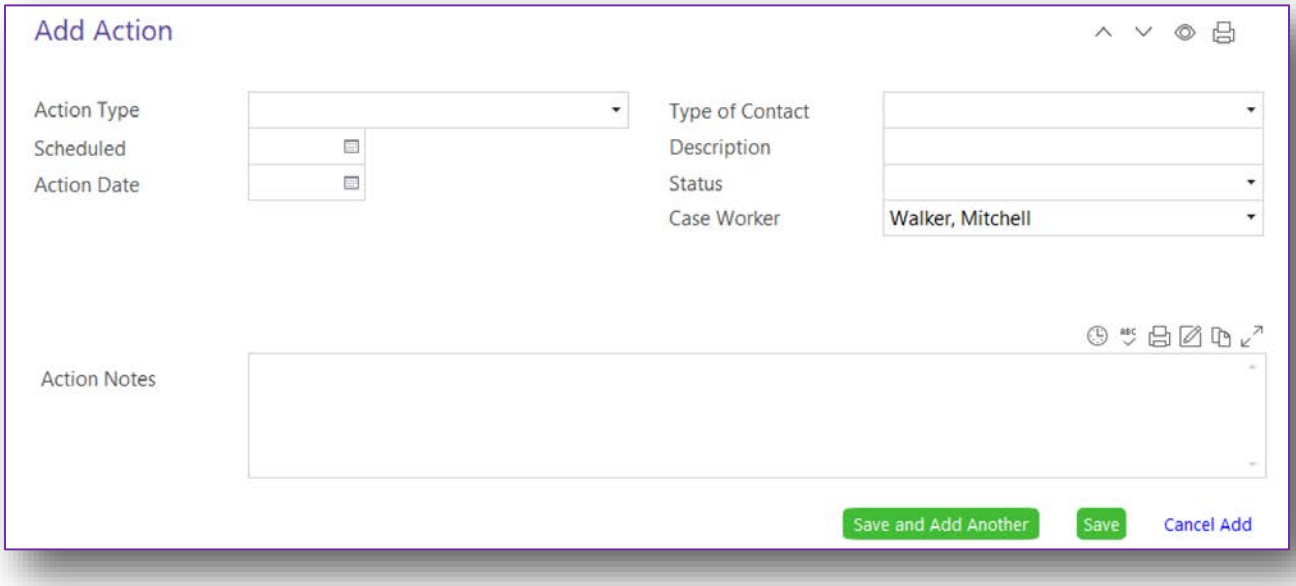
Please enter at least one Action before the event is saved.

Adding an Action

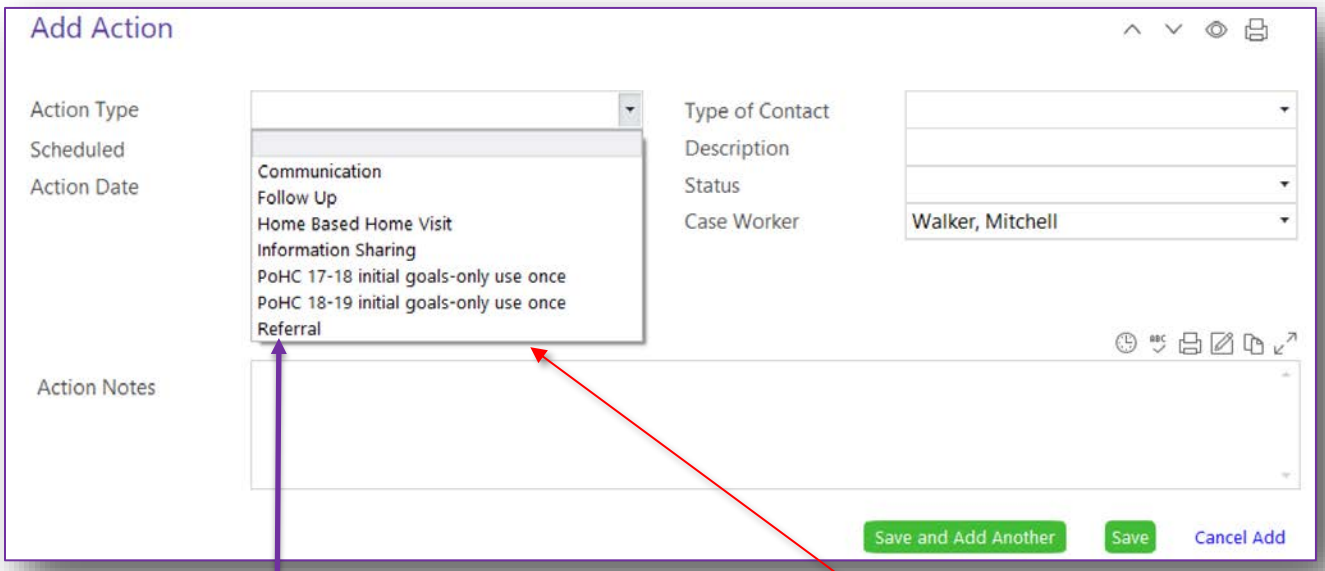


REMEMBER: Every event **MUST** have at least 1 associated Action!

Every field must be completed for each action. Proceed through the manual for instructions for each field.



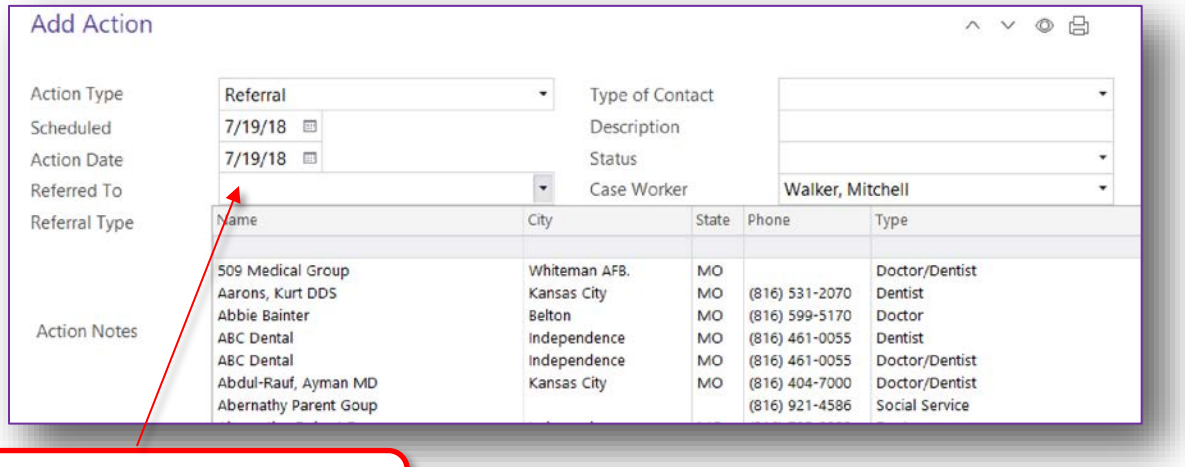
Action Type



If Referral is chosen, additional fields will be available, and must be completed. If the action is not a referral, proceed to Scheduled Date on the next page for instructions.

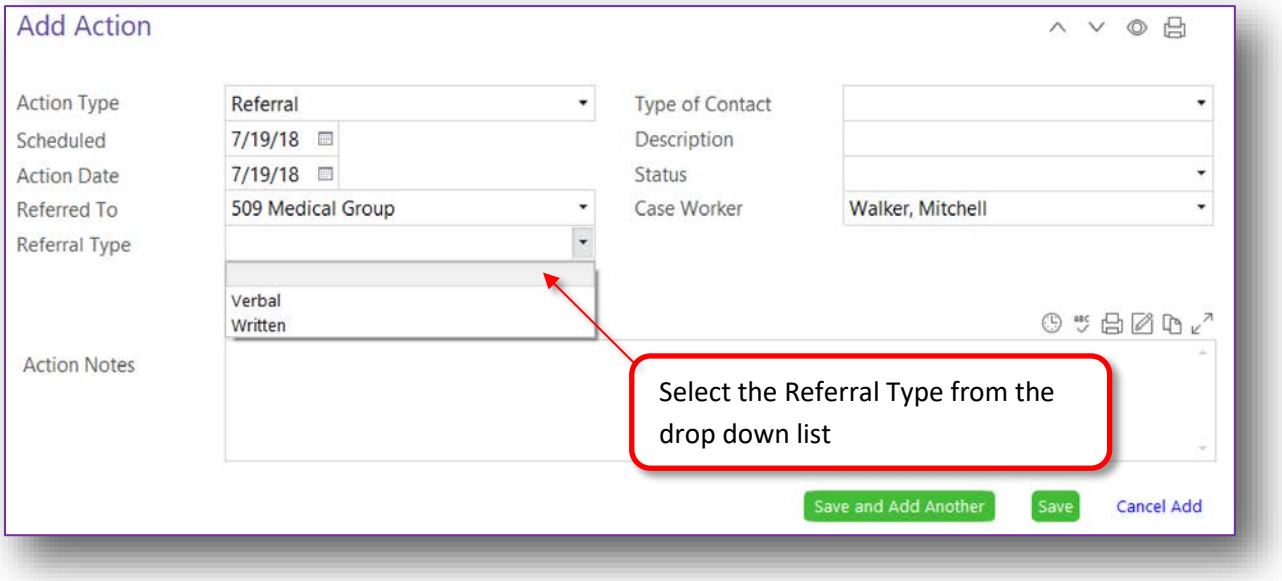
Select the appropriate Action Type

Referred To



Select the Referral agency from the drop down list

Referral Type

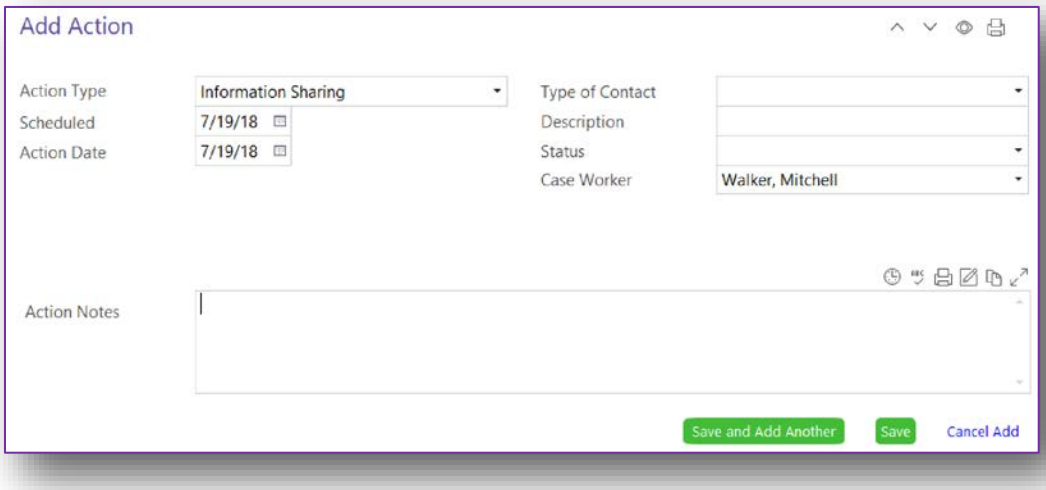


Scheduled

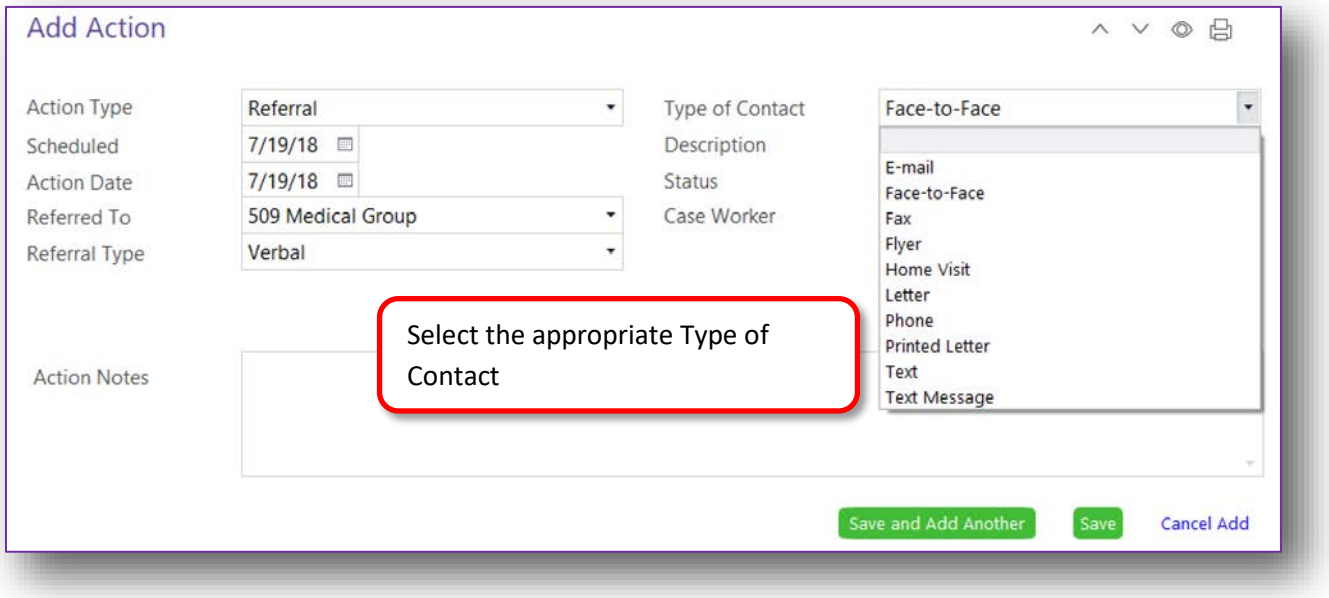
Enter the date that the action is scheduled to occur

Action Date

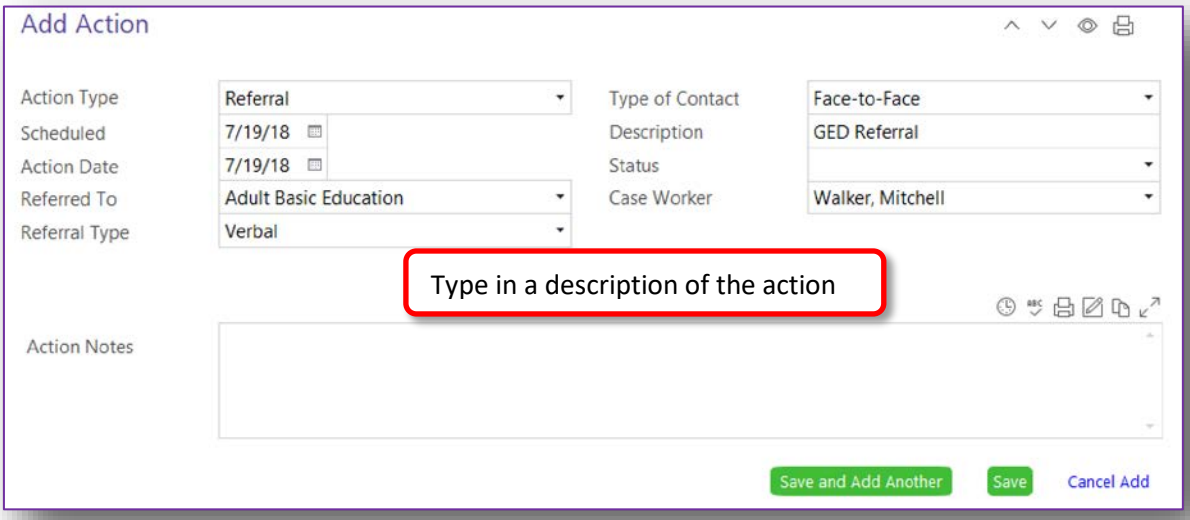
If the action is completed, enter the date that the action occurred



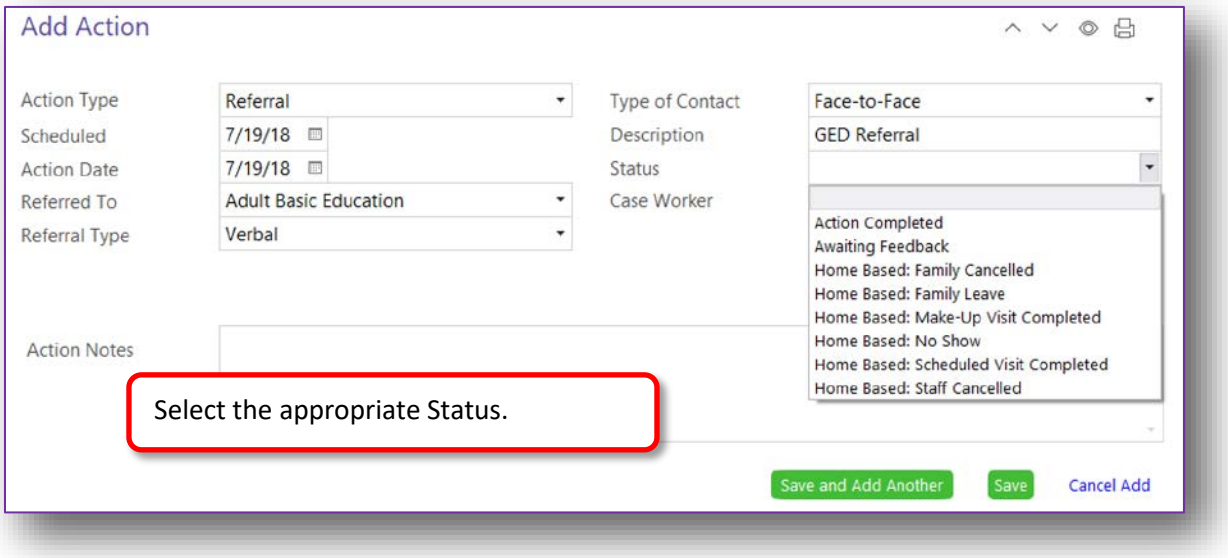
Type of Contact



Description



Status



Determining Status

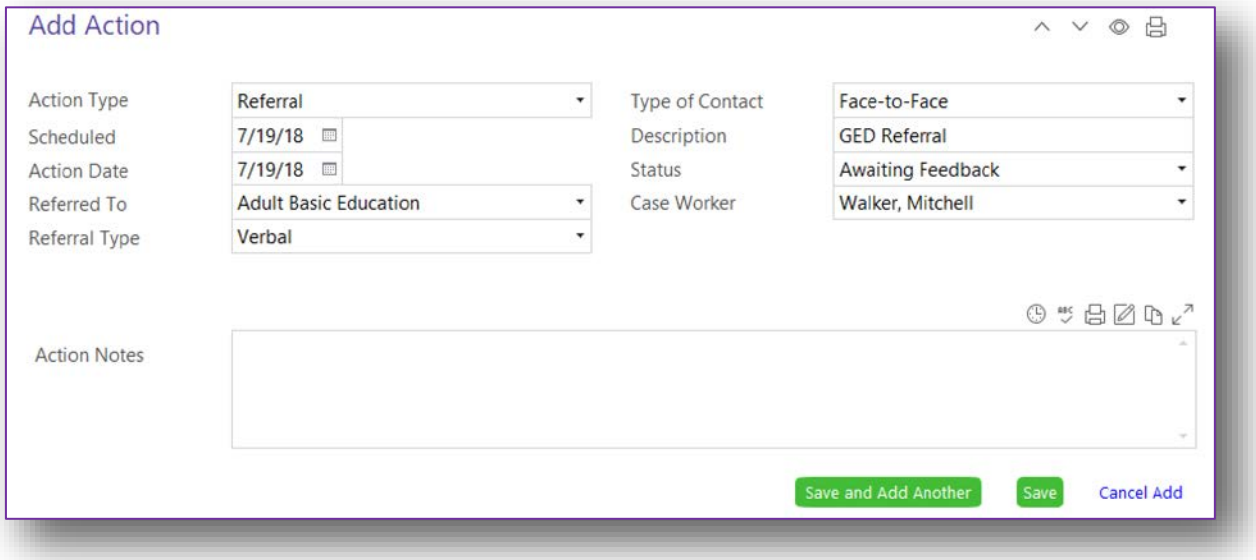
Any Status preceded by "Home Based:" is ONLY to be used by home-based staff for documentation of home visit attendance.

Any other status should be chosen based on the action taking place. The options are:

- Action Completed
- Awaiting Feedback

Case Worker

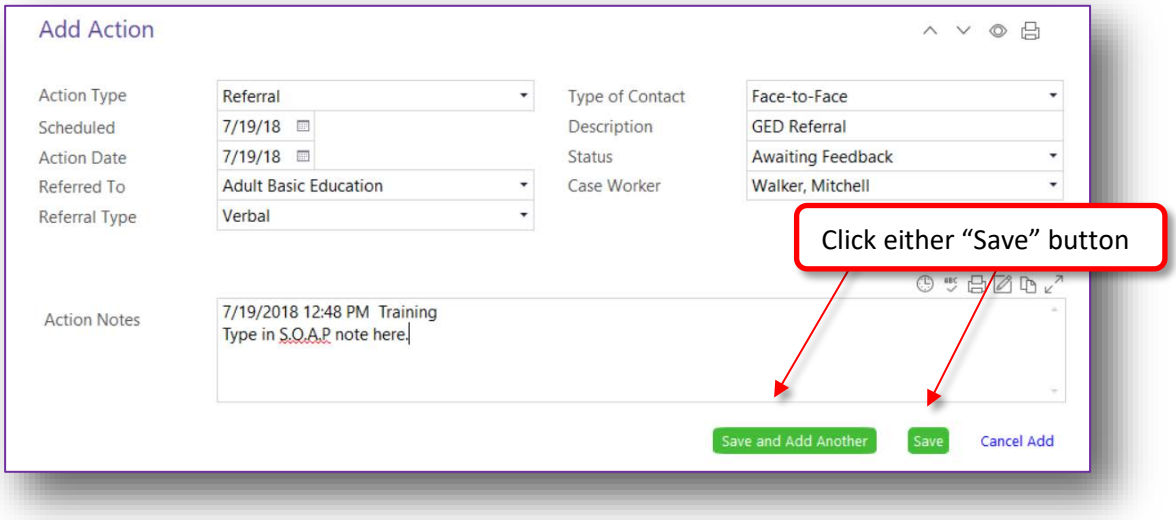
Select the Agency Worker who is responsible for the action. This defaults to the Case Worker listed in the Family Information section.



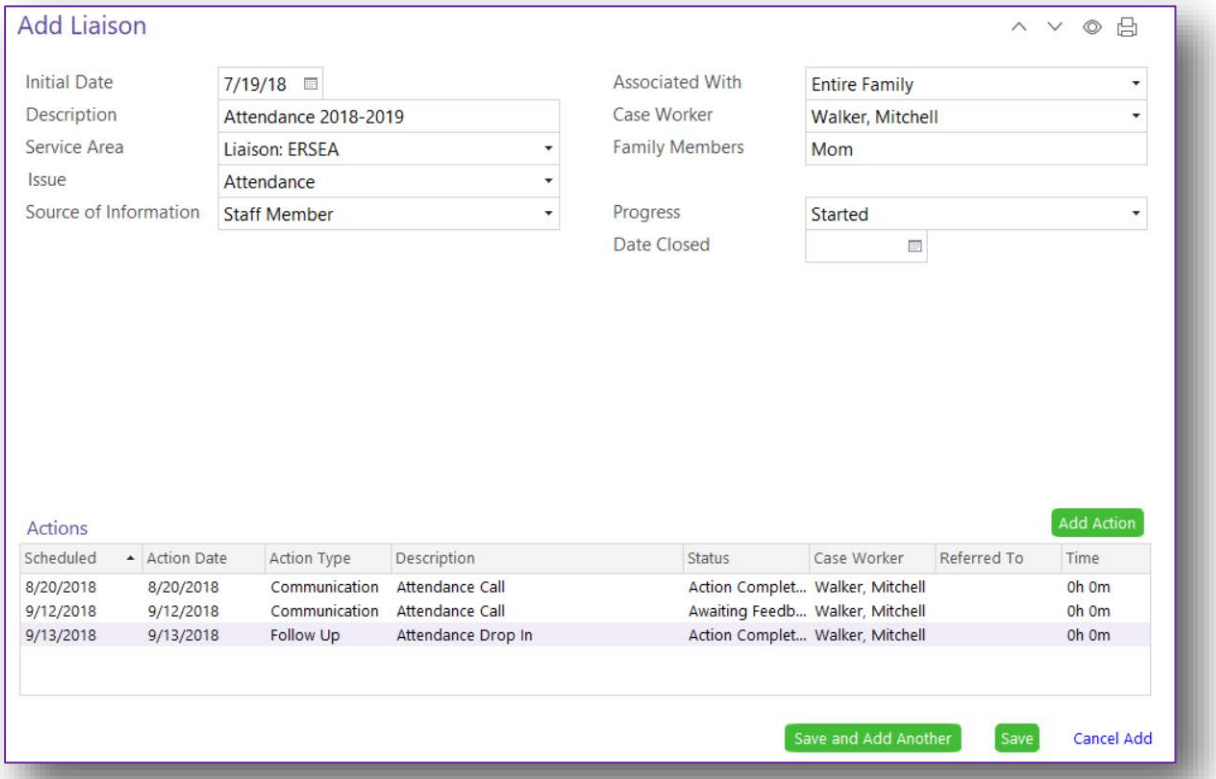
While you may see the Total Time fields, you **do not need to complete them**

Action Notes

Enter the S.O.A.P. note for each action in the Action Notes field. S.O.A.P. notes should include the Who, What, Why, and When. For assistance with S.O.A.P. notes, contact your Family Engagement content lead.



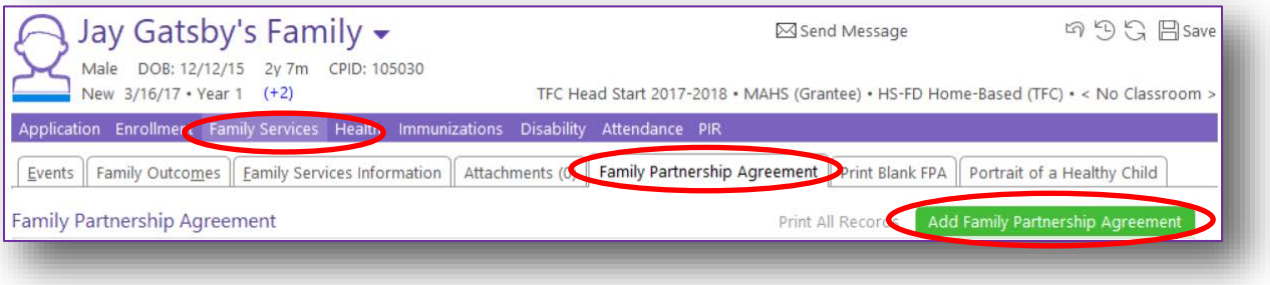
Example of Annual Event with Actions



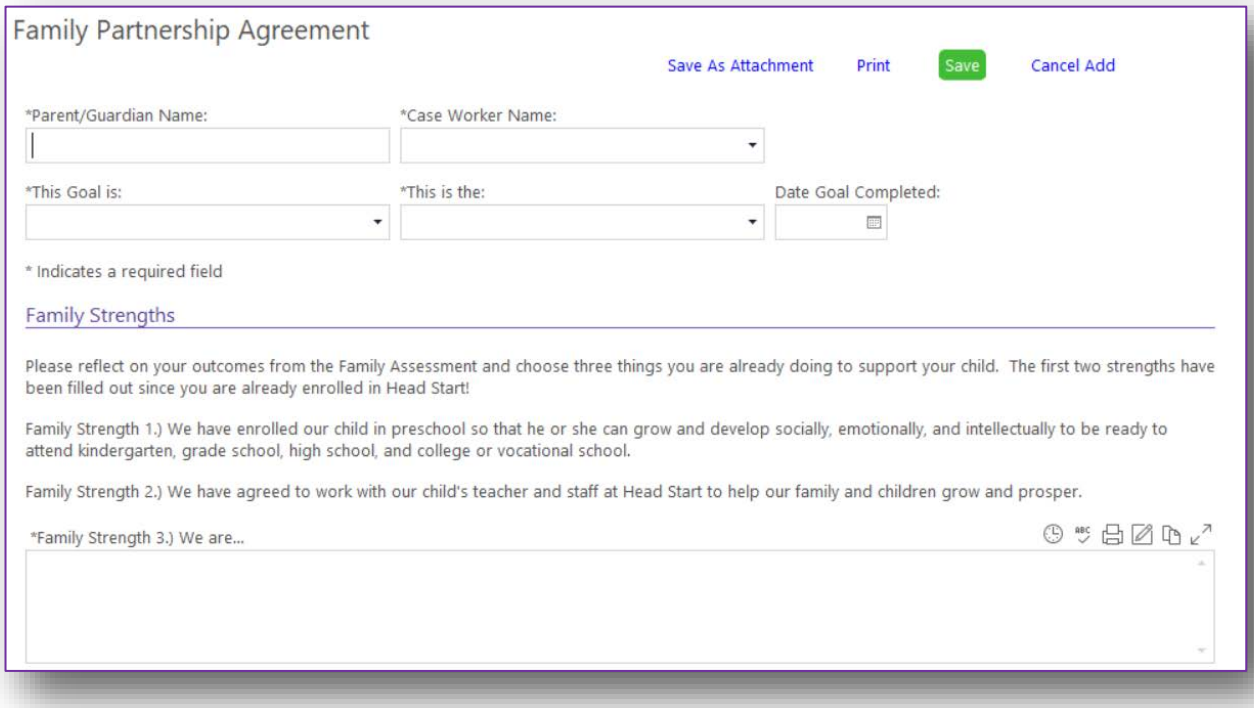
Family Partnership Agreements

Adding a New Family Partnership Agreement

To add a new Family Partnership Agreement (FPA), click on the Family Services section, then the Family Partnership Agreement tab, then the green Add Family Partnership Agreement button.

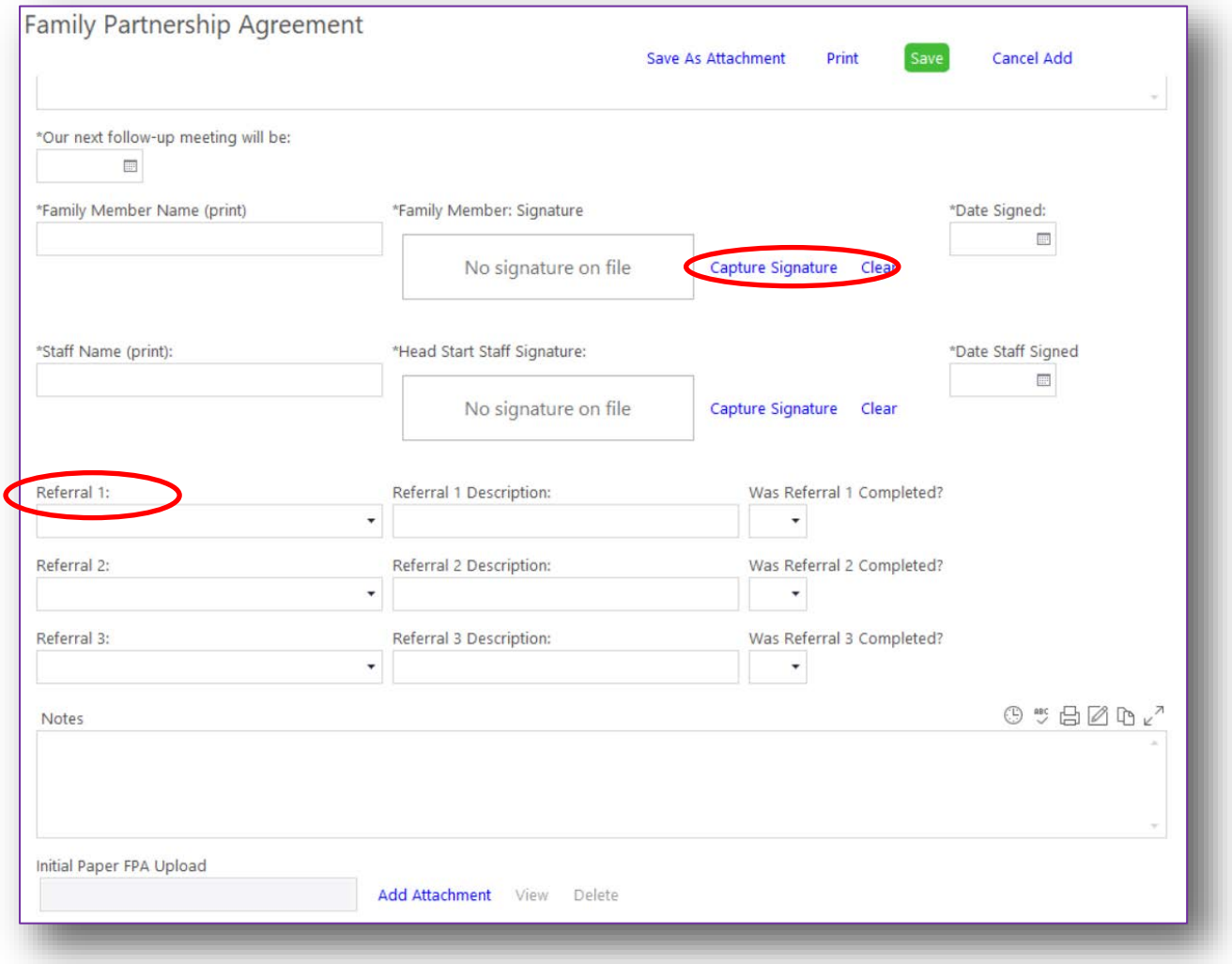


This will bring up the Family Partnership Agreement. Complete <u>every</u> field up to the end of the Family Goals – Meeting 1 section, <u>including</u> parent signature.



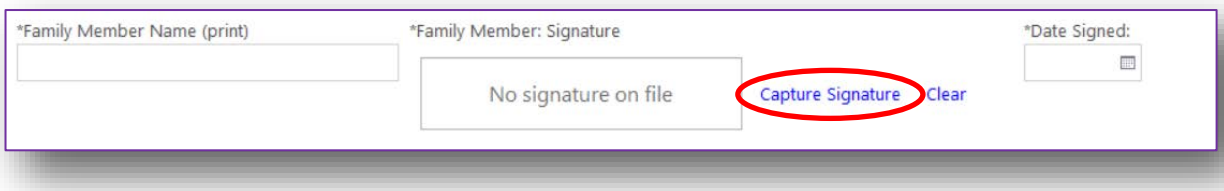
In the final section of a new Family Partnership Agreement, make sure to complete the following:

- Staff and Parent Electronic Signature
- Any Referrals made during the FPA process

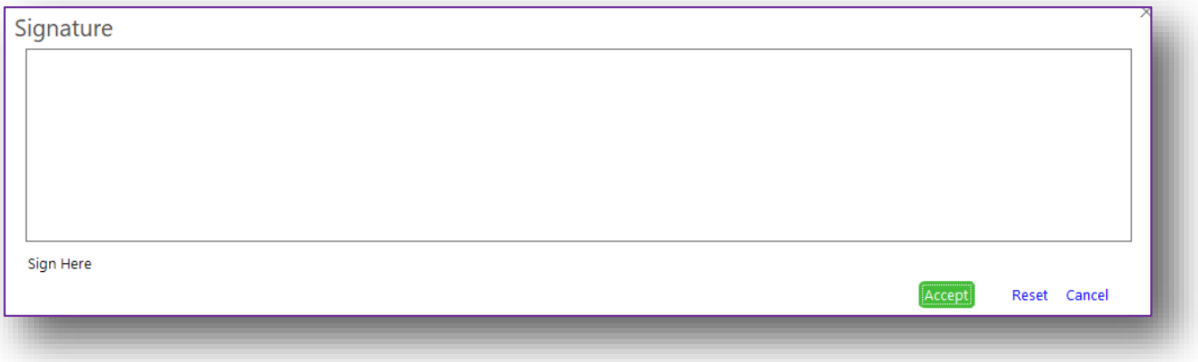


Family Partnership Agreement Electronic Signature

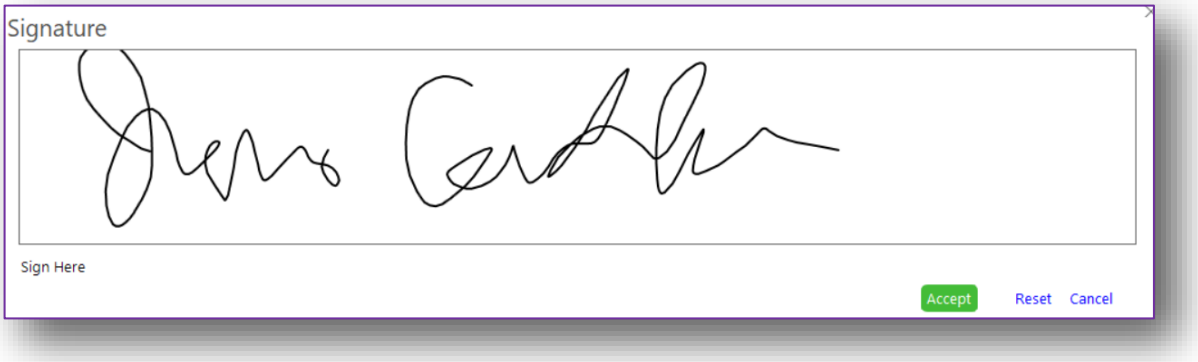
Click the Capture Signature button



The signature capture screen will appear.

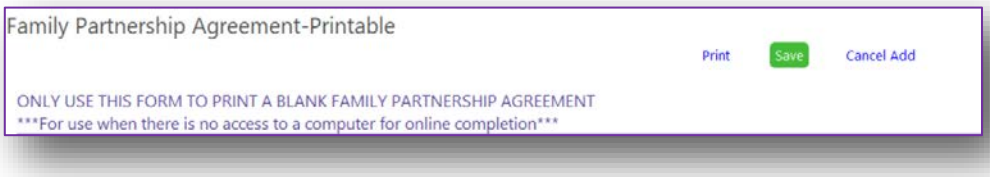


Use a touch screen or mouse to complete the electronic signature, and click Accept. If entering an FPA from a paper form, sign “See Attached”.



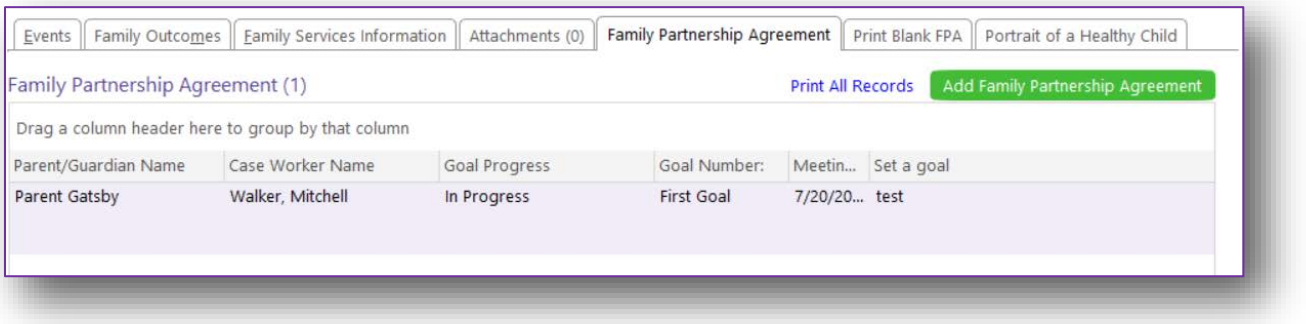
Uploading a Paper FPA

In certain circumstances, it may be necessary to use a paper FPA for (power outage, loss of internet, etc.). In this case, open the Print Blank FPA module, Click the Add Blank FPE button, then click print. Finally, click Cancel Add to back out without saving the blank FPA.

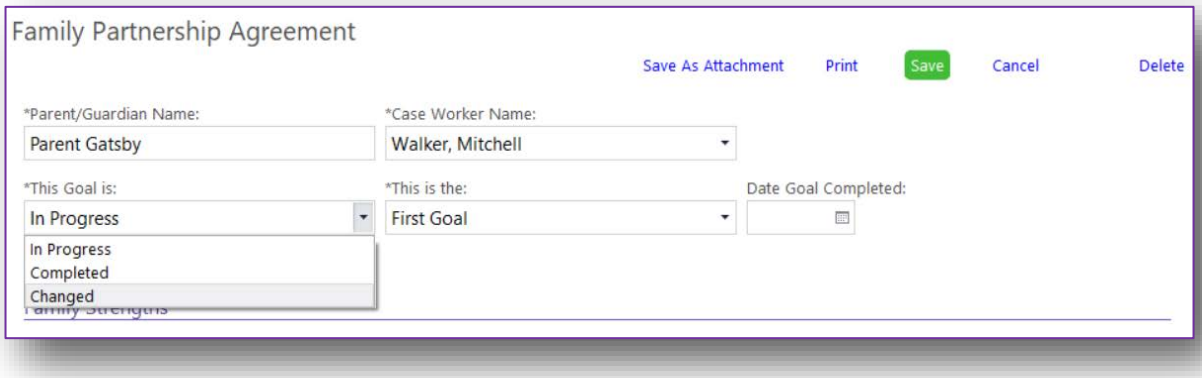


Updating a Family Partnership Agreement

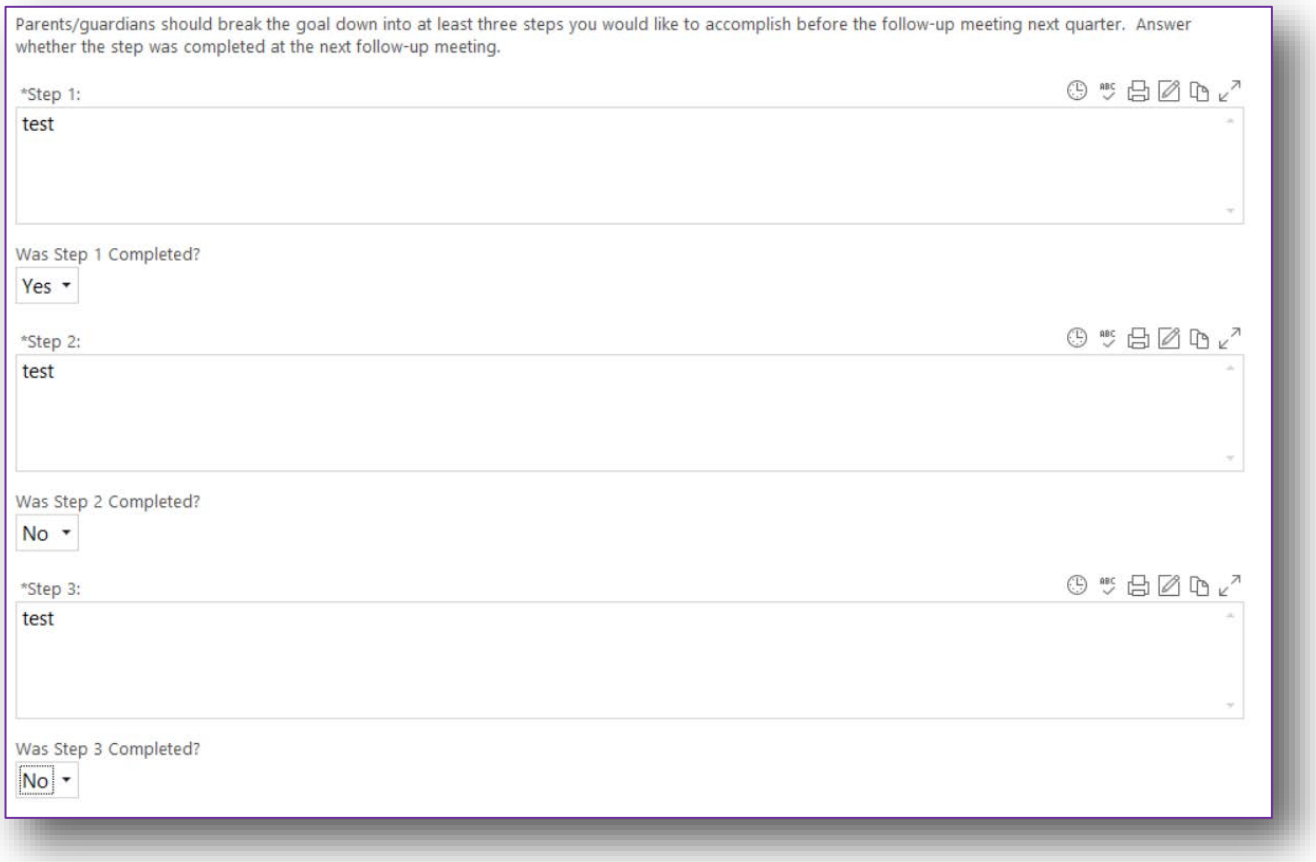
Each quarter, the Family Partnership Agreement should be reviewed, and progress updated with each family. Click on the FPA to be updated.



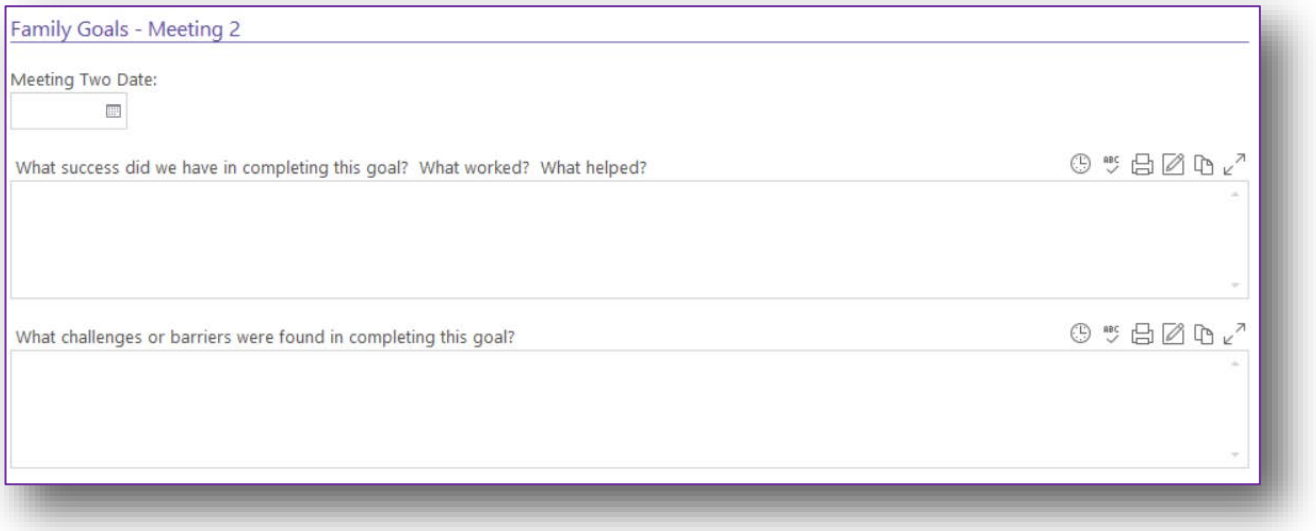
If the family goal was changed, select Changed, and edit the information and steps in the goal. If it remains the same, continue with updating the current FPA.



If any steps were completed, choose Yes in the Meeting 1 section



Once Meeting 1 has been updated, continue to the section labeled Family Goals – Meeting 2 and complete all fields.



Complete these steps each quarter until all 4 meeting sections have been completed, the goal is met, or the program year ends.

Family Partnership Agreement field guide

This guide is for fields that are not easily recognizable. Fields such as Name, and Date are not included.

- This Goal is: Select whether the goal is In Progress, Completed, or Changed
- This is the: Select whether this is the First, Second, Third, or Fourth goal for the family this year.

****You will only select the Second goal if the First goal was completed****

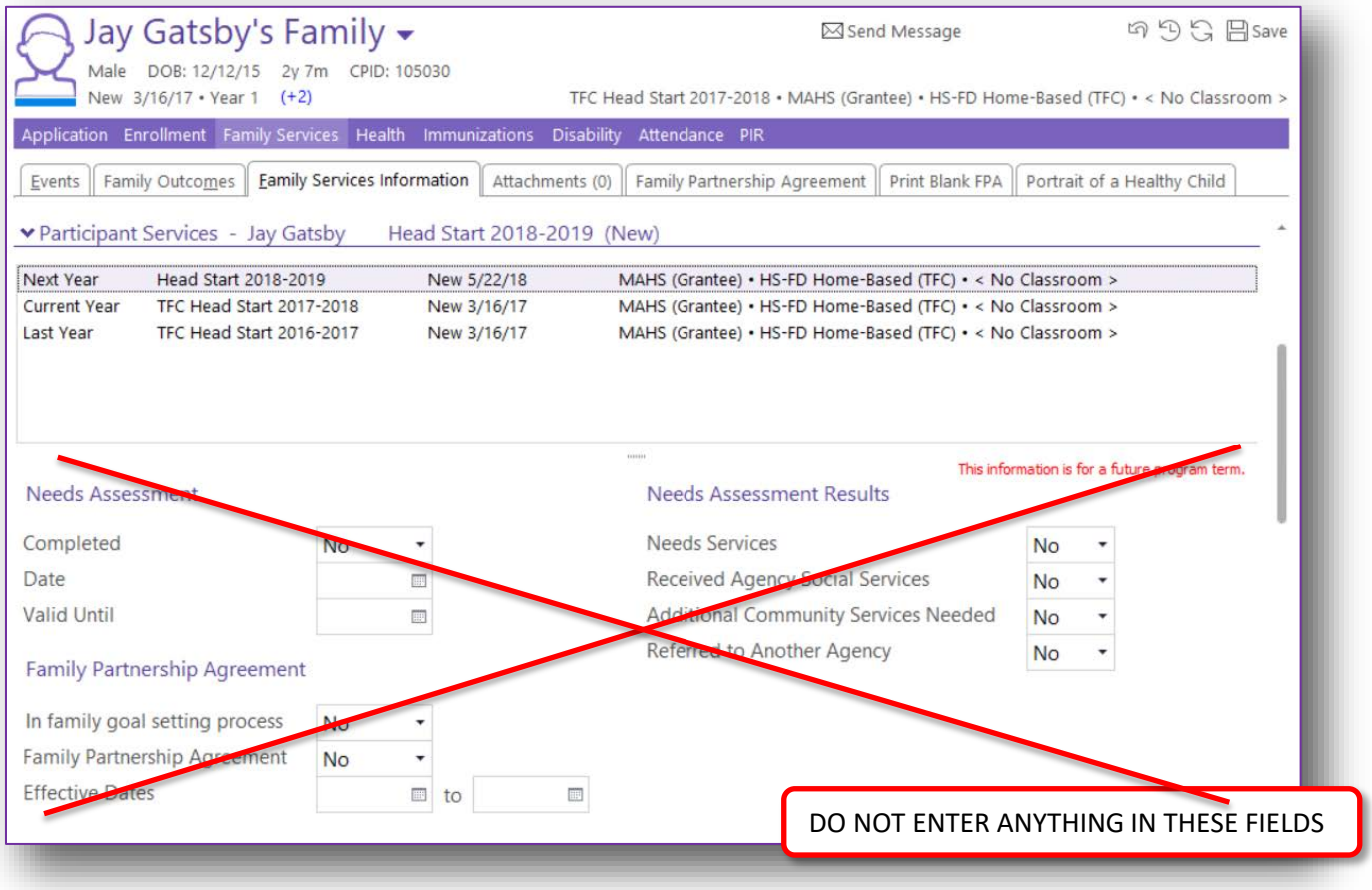
****You will only select the Third goal if the Second goal was completed****

****You will only select the Fourth goal if the Third goal was completed****

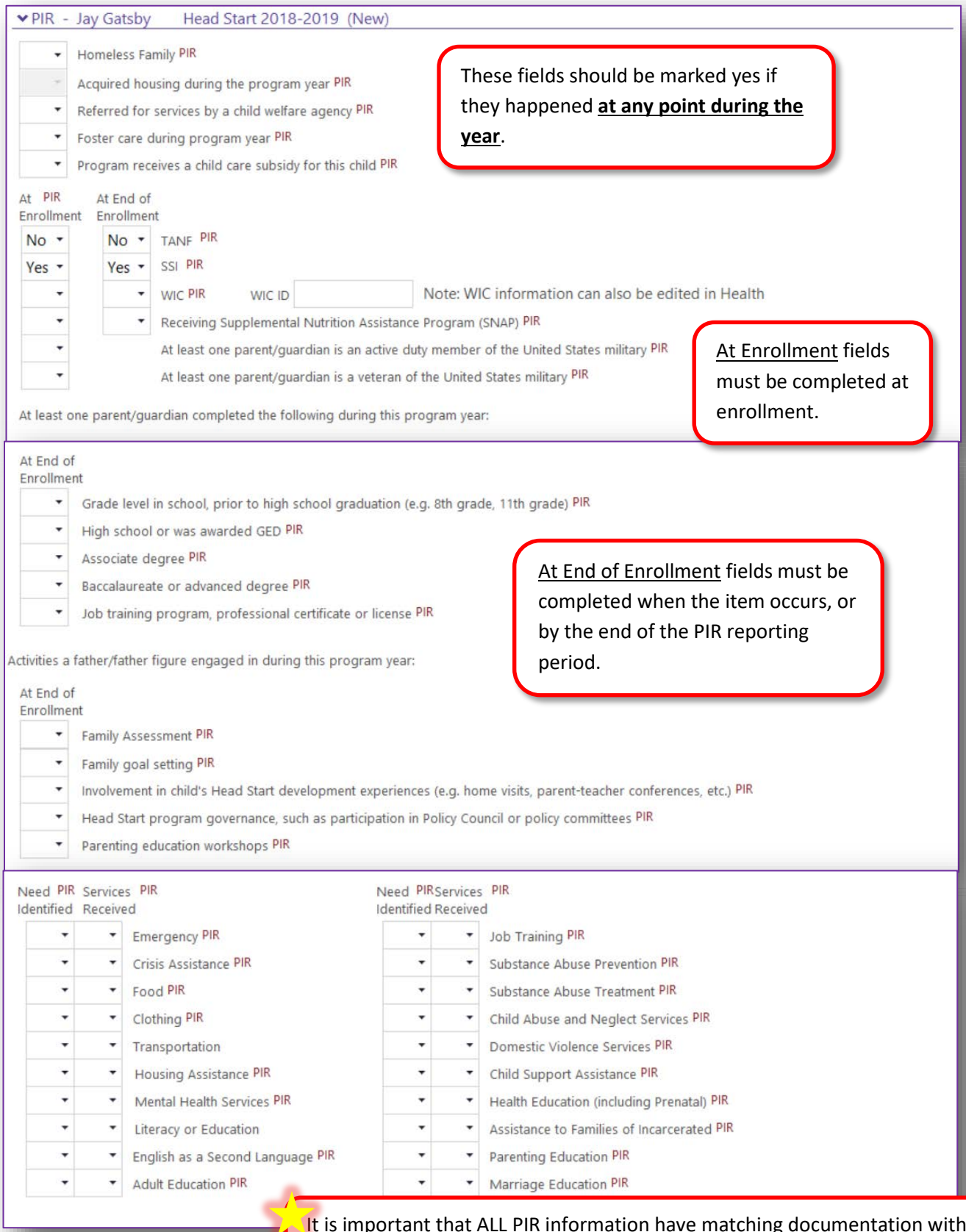
Entering Family Services Information

When entering Family Services Information into ChildPlus, start by selecting a participant and clicking the ***Family Services*** Tab. Click the ***Family Services Information*** tab.

Needs Assessment & FPA



PIR Information



These fields should be marked yes if they happened **at any point during the year**.

At Enrollment fields must be completed at enrollment.

At End of Enrollment fields must be completed when the item occurs, or by the end of the PIR reporting period.

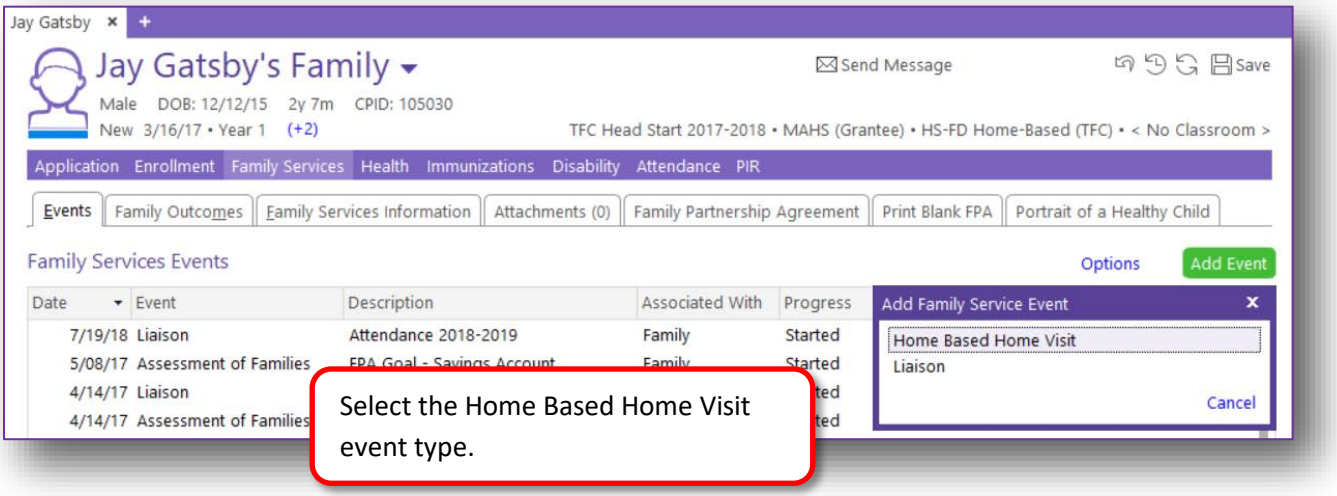
It is important that ALL PIR information have matching documentation within the Family Service Event area!!

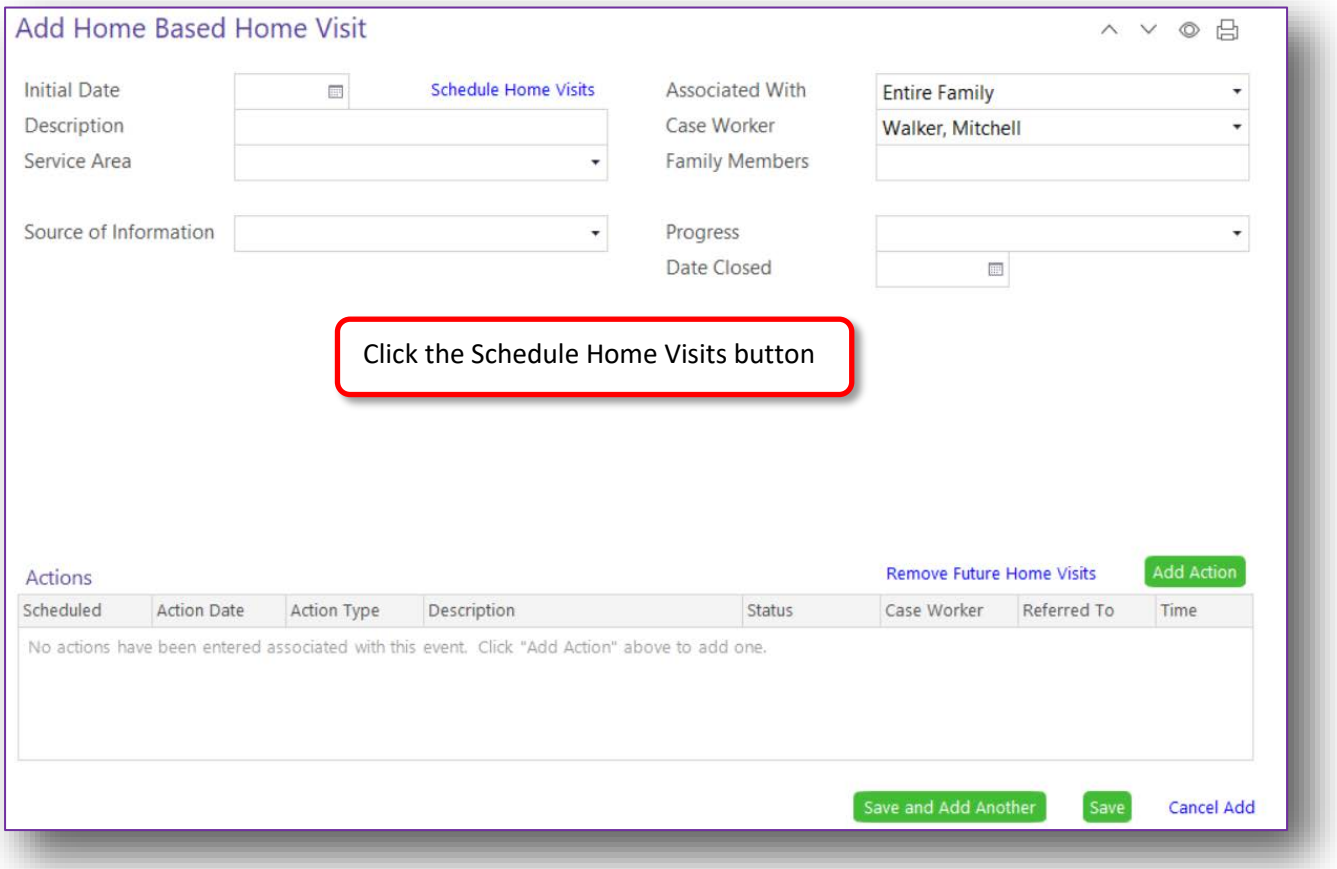
Home Based Home Visit Attendance Documentation

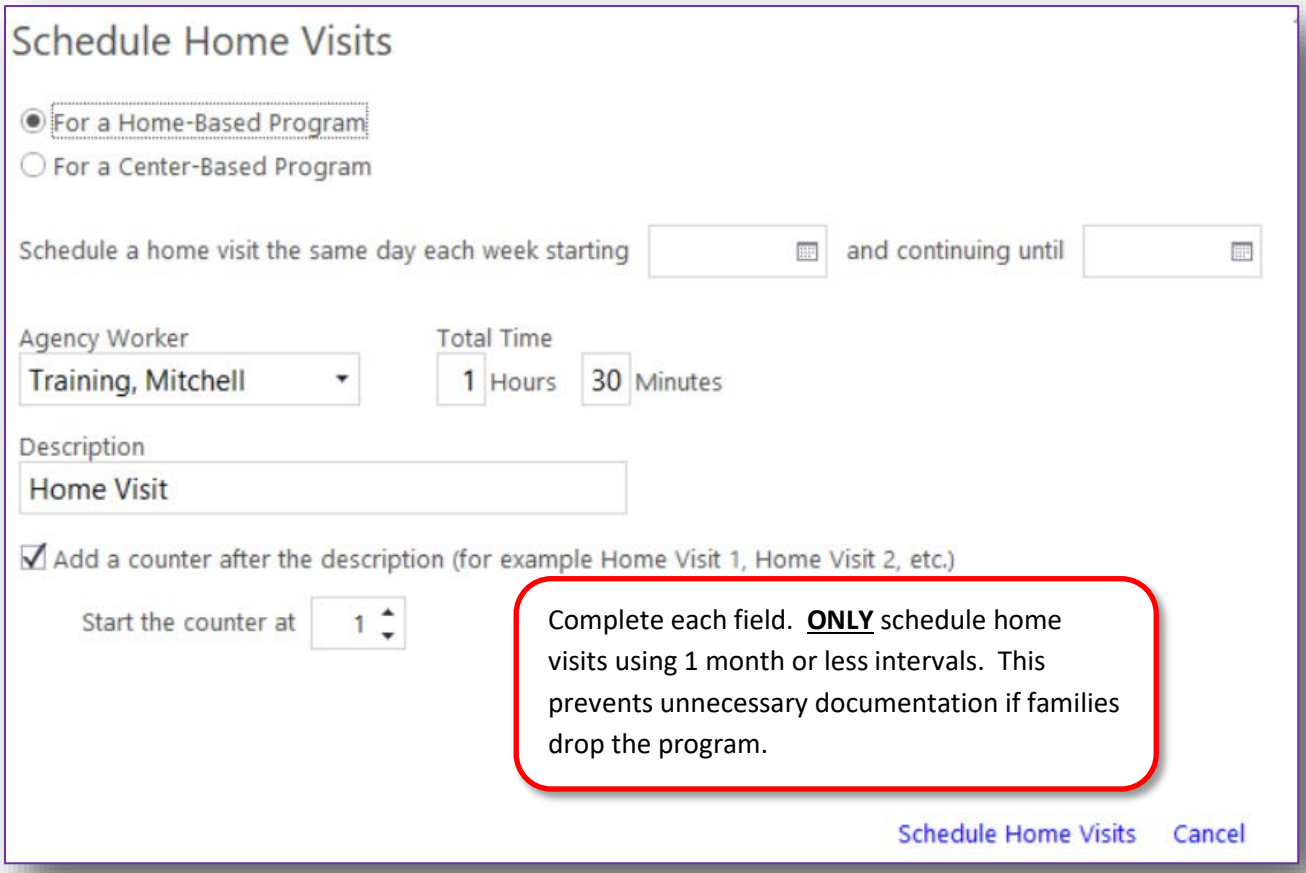
Home Based Home Visits will be entered following the same instructions as all other Events and Actions

Use the following illustration and guide to assist with documentation

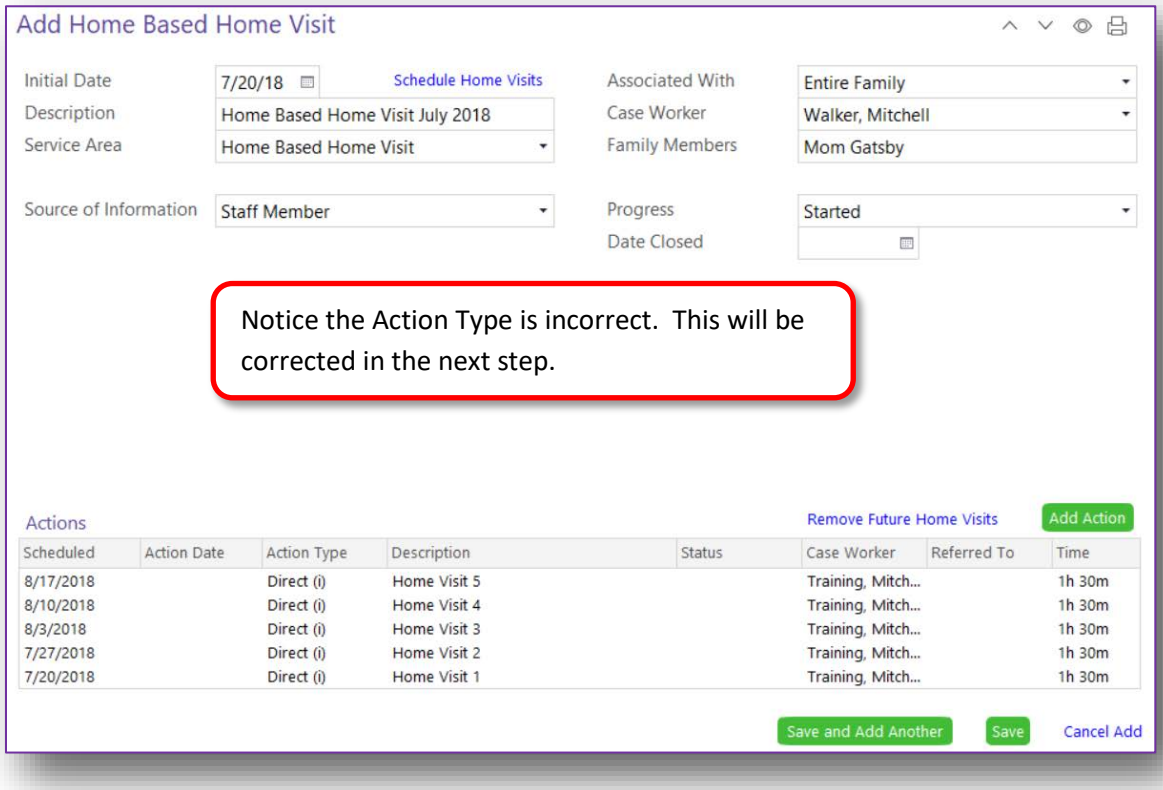
Event





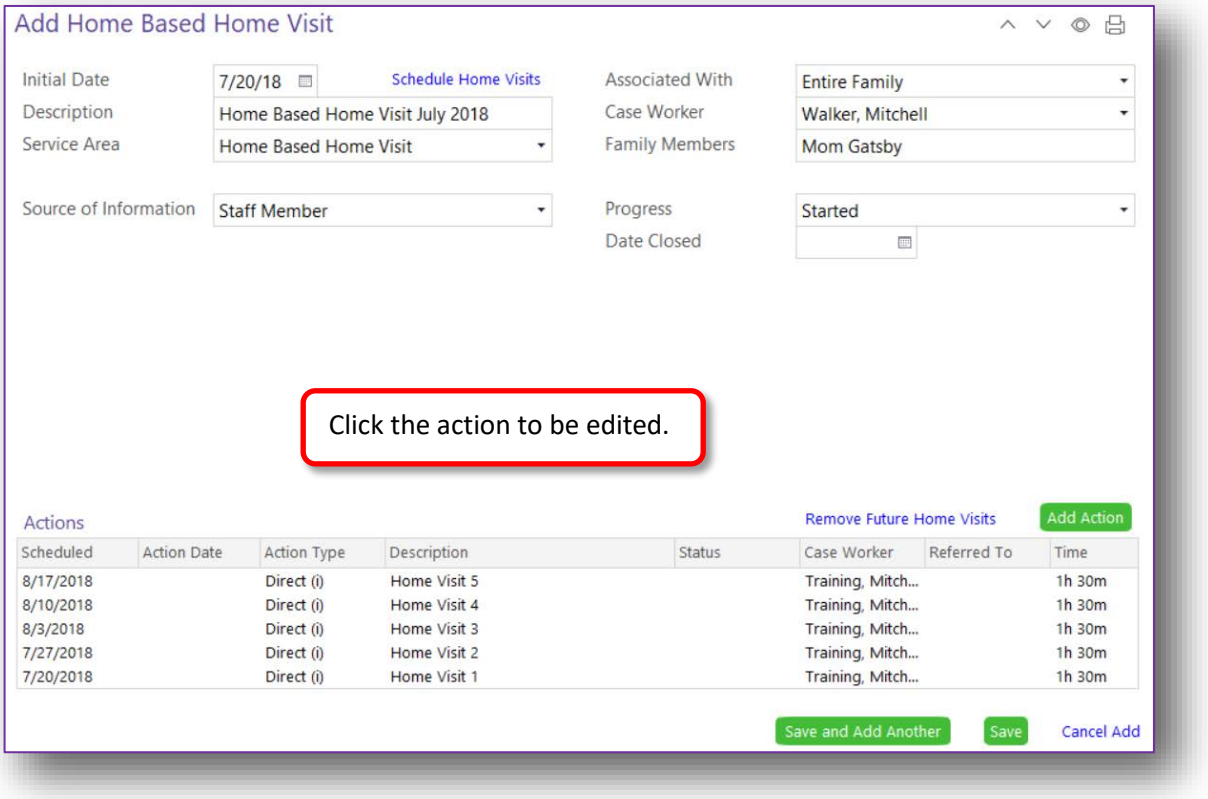

Schedule Home Visits
For a Home-Based Program
For a Center-Based Program
Schedule a home visit the same day each week starting
and continuing until
Agency Worker
Training, Mitchell
Total Time
1 Hours
30 Minutes
Description
Home Visit
Add a counter after the description (for example Home Visit 1, Home Visit 2, etc.)
Start the counter at
1
Complete each field. ONLY schedule home visits using 1 month or less intervals. This prevents unnecessary documentation if families drop the program.
Schedule Home Visits
Cancel

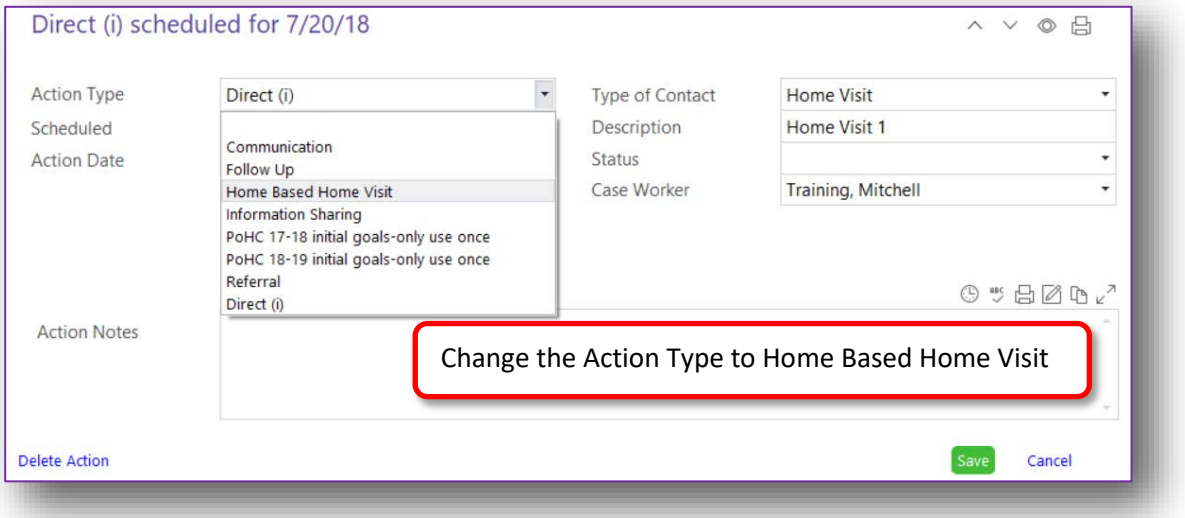
Example

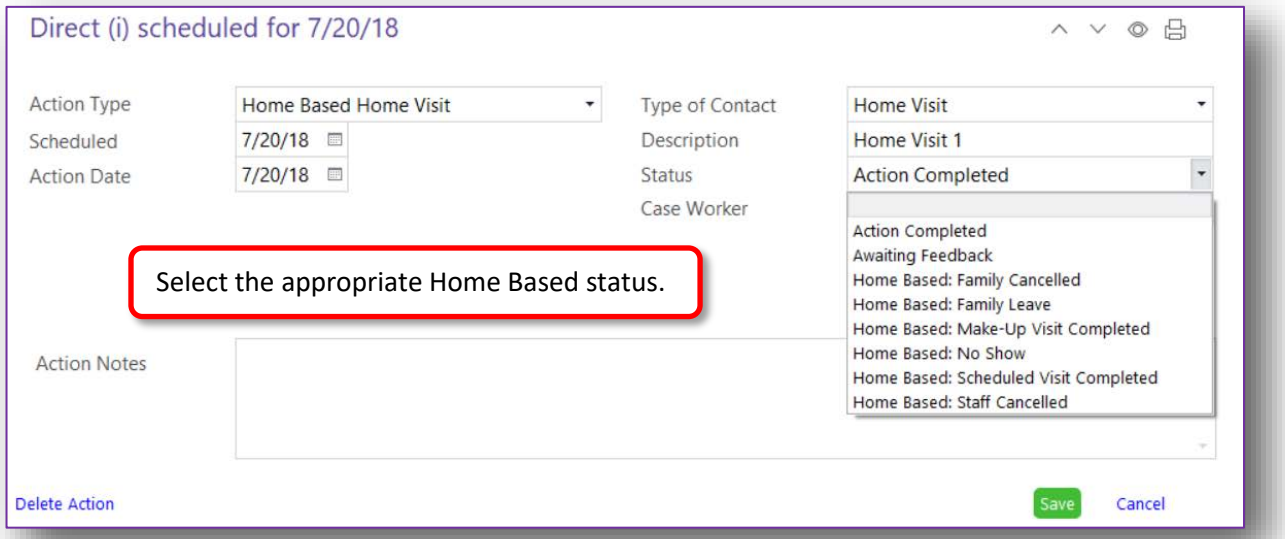

Add Home Based Home Visit
Initial Date
7/20/18
Schedule Home Visits
Description
Home Based Home Visit July 2018
Service Area
Home Based Home Visit
Source of Information
Staff Member
Associated With
Entire Family
Case Worker
Walker, Mitchell
Family Members
Mom Gatsby
Progress
Started
Date Closed
Notice the Action Type is incorrect. This will be corrected in the next step.
Actions
Remove Future Home Visits
Add Action
Scheduled
Action Date
Action Type
Description
Status
Case Worker
Referred To
Time
8/17/2018
Direct (i)
Home Visit 5
Training, Mitch...
1h 30m
8/10/2018
Direct (i)
Home Visit 4
Training, Mitch...
1h 30m
8/3/2018
Direct (i)
Home Visit 3
Training, Mitch...
1h 30m
7/27/2018
Direct (i)
Home Visit 2
Training, Mitch...
1h 30m
7/20/2018
Direct (i)
Home Visit 1
Training, Mitch...
1h 30m
Save and Add Another
Save
Cancel Add

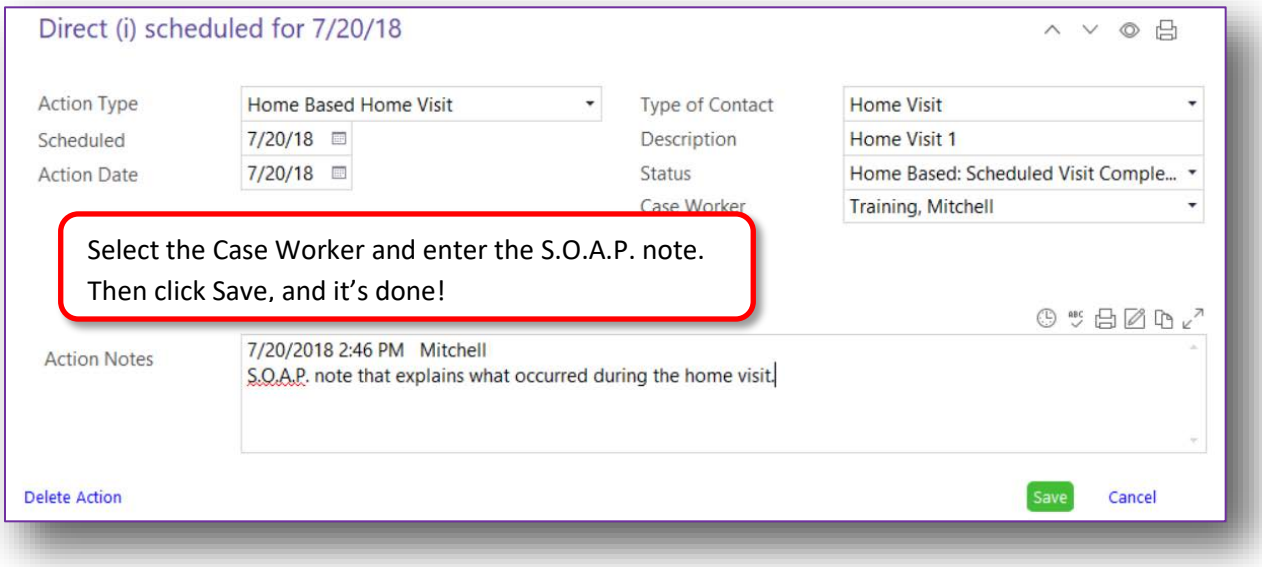
Actions

Once the Home Visit has happened, edit the action associated with the date the visit occurred.





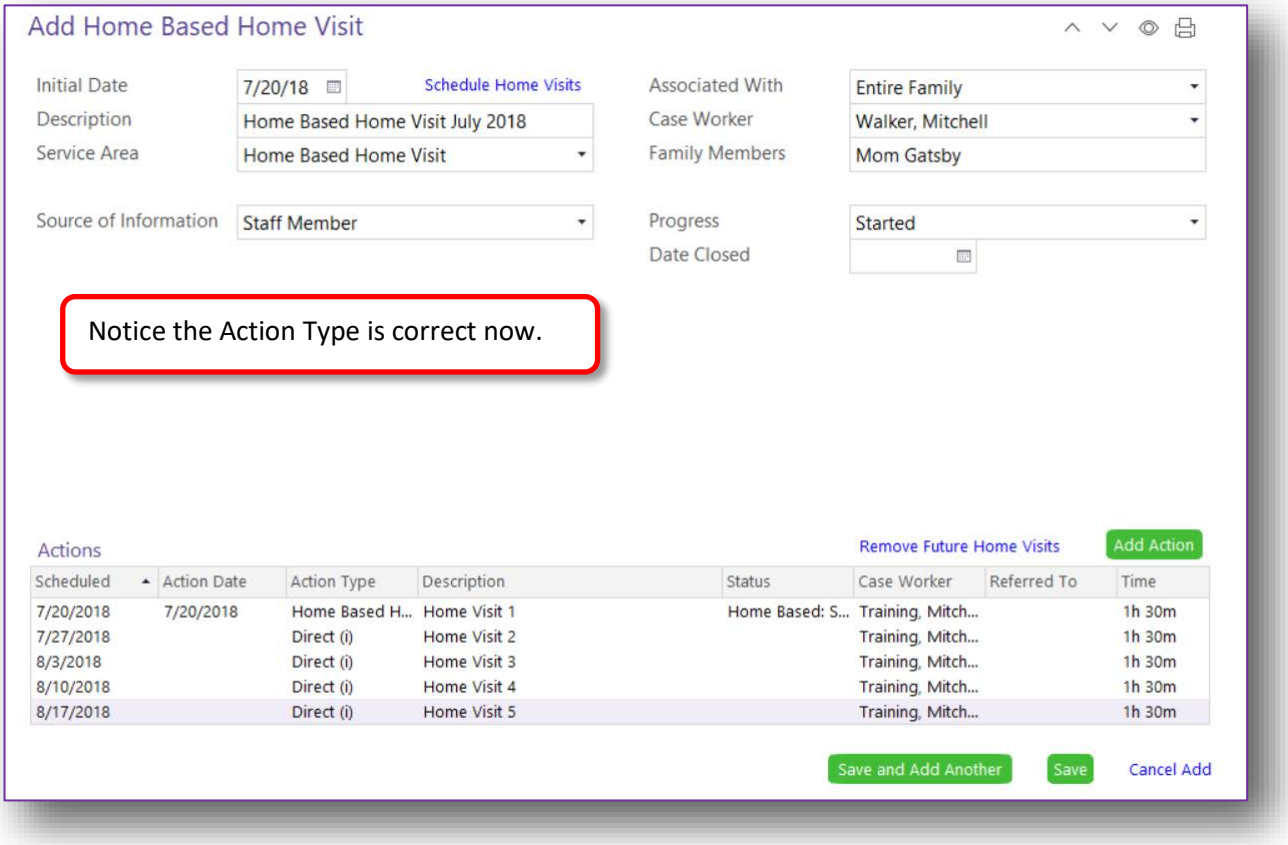




Home Visits must be **fully** documented in the Action Notes.

If not, then Home Visit Lesson Plans **must** be uploaded as an attachment. Then please explain in the Action Notes field a summary of what occurred in the Home Visit.

For instructions on how to add attachments, please see

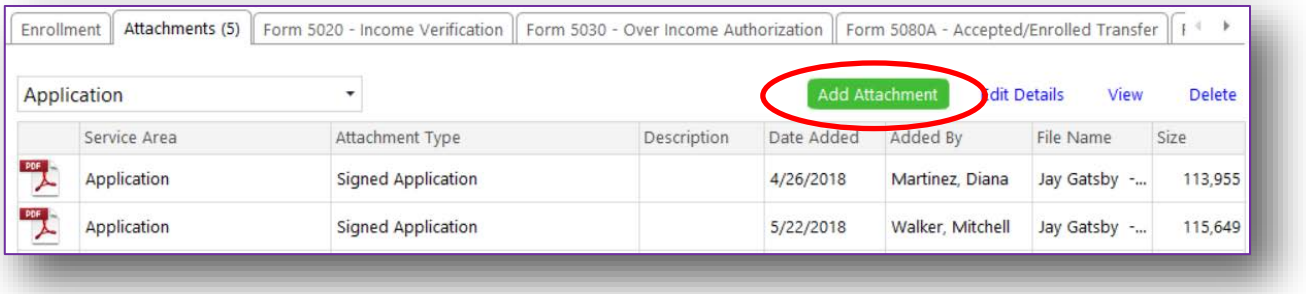


The documentation for a single Home Visit attendance is now complete. Each family should have a Home Based Home Visit event for each month they are enrolled in the program.

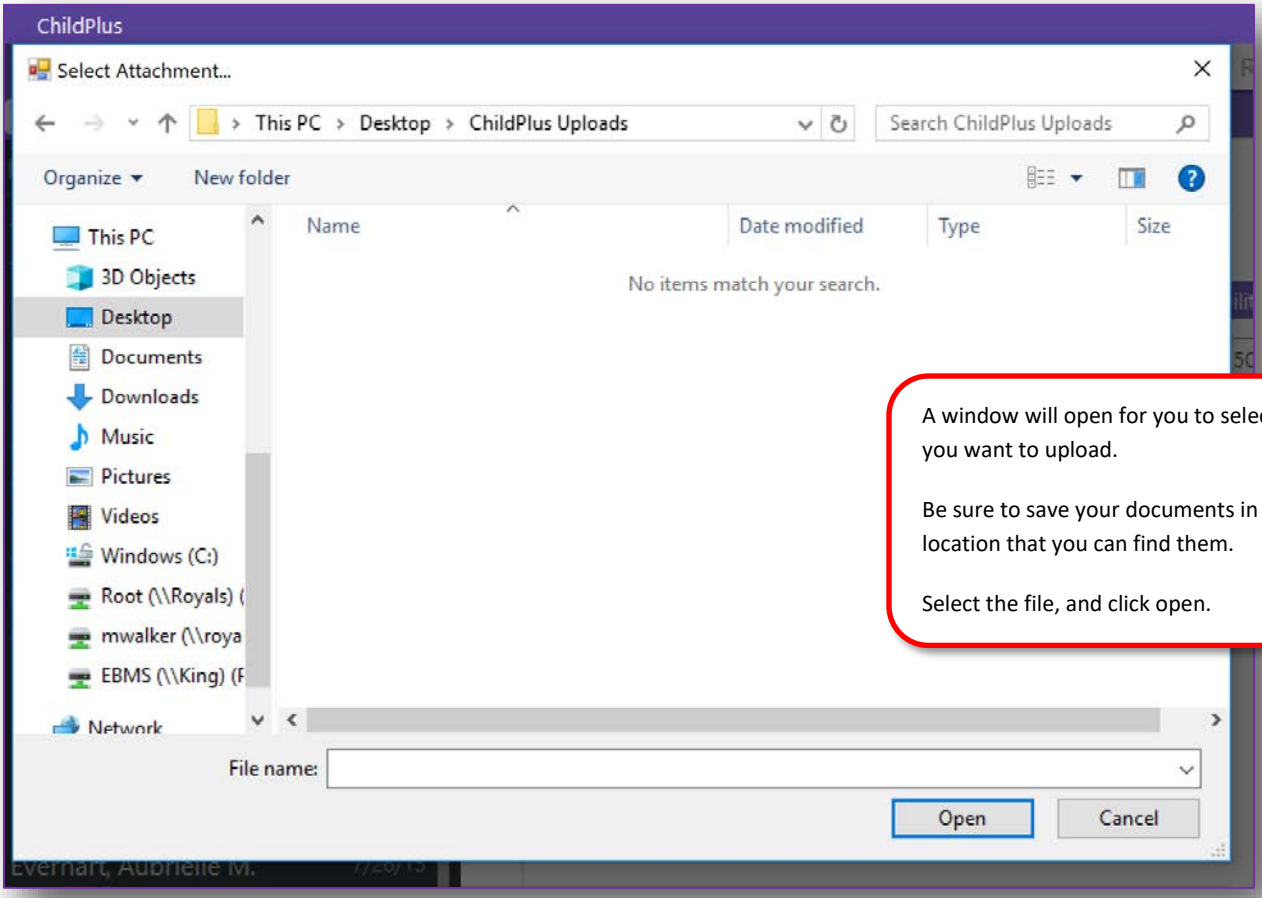
Managing Attachments

Within most modules, click on the Attachment tab to begin managing attachments. Attachments may include income documents, immunizations, physicals, and many other documents. Please see below for where each type of attachment is categorized.

Adding Attachments



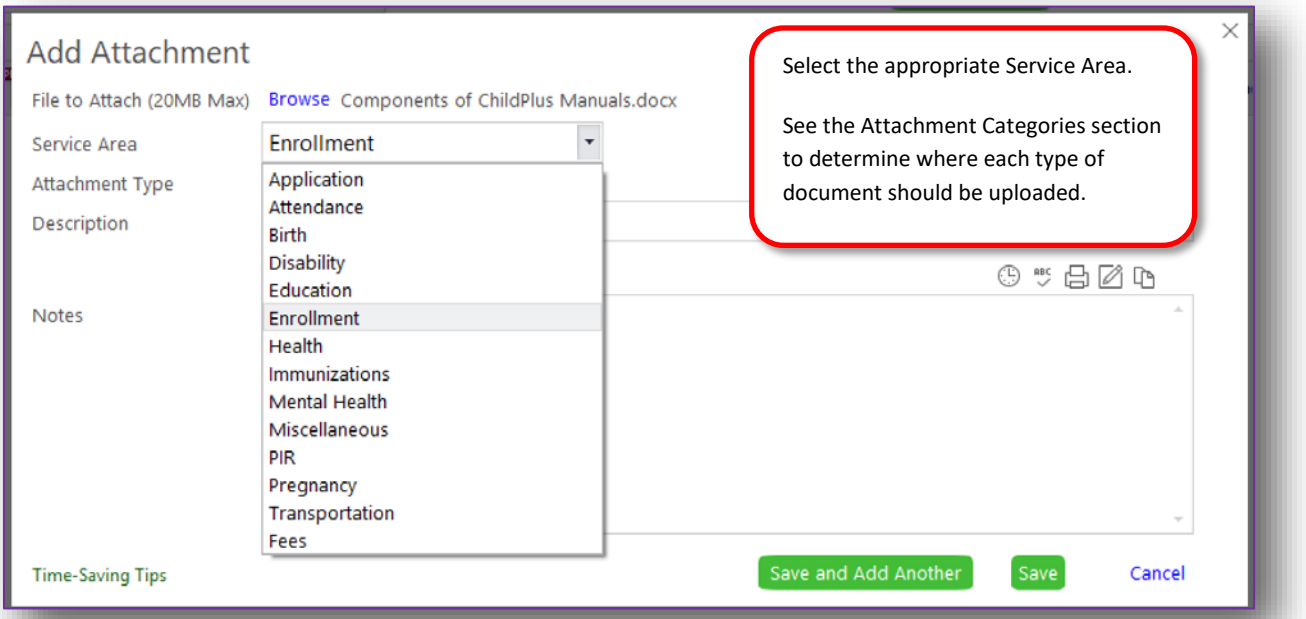
Click the Add Attachment button

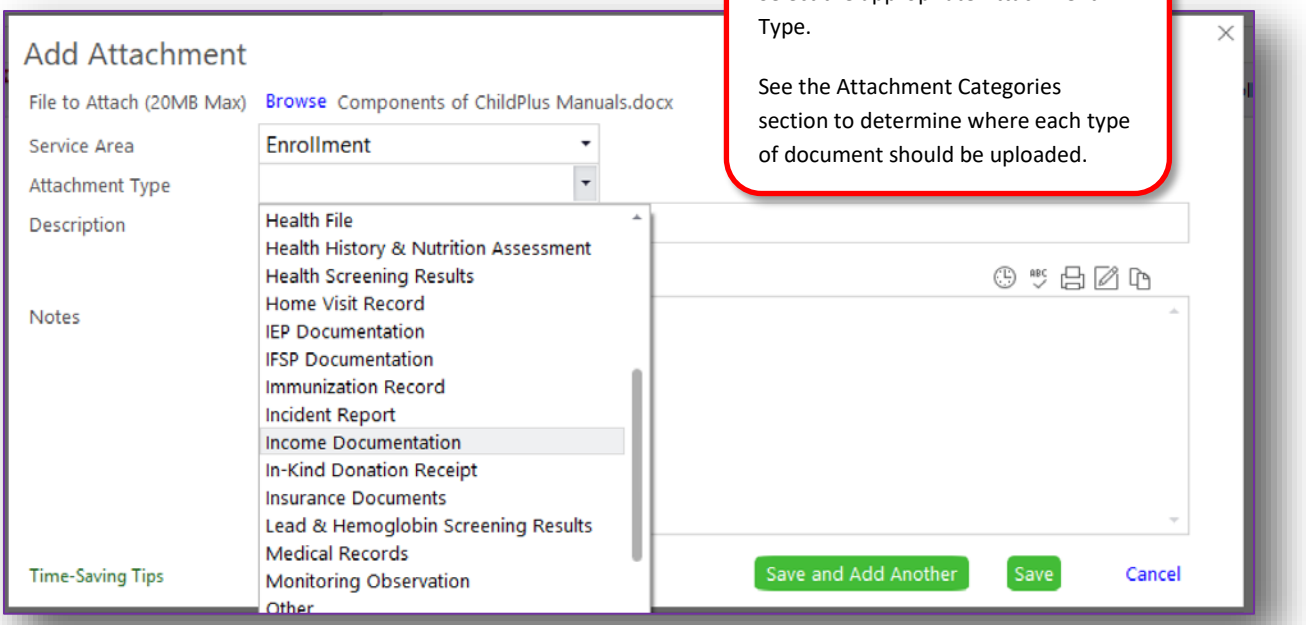


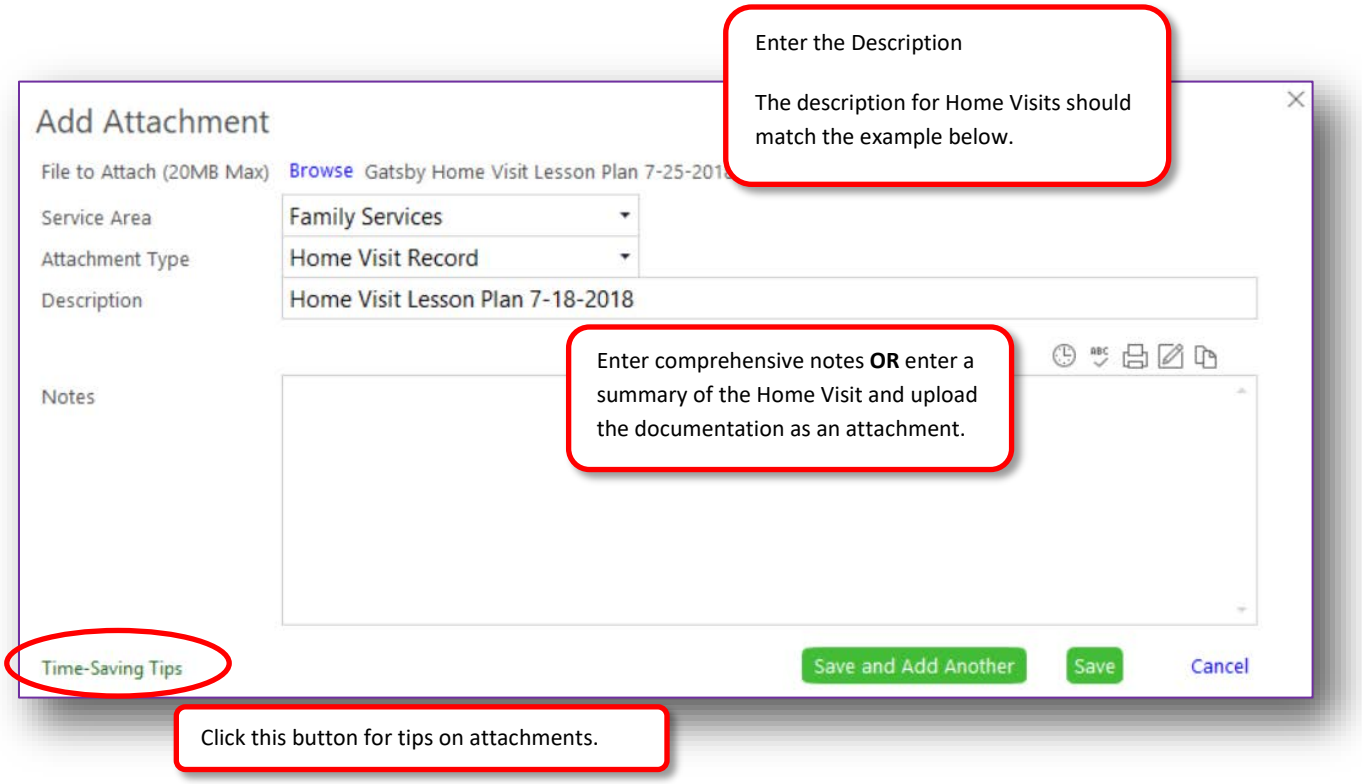
A window will open for you to select the file you want to upload.

Be sure to save your documents in a location that you can find them.

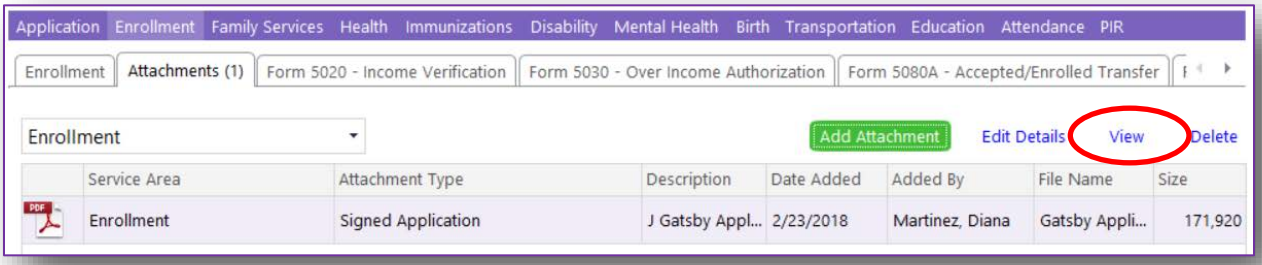
Select the file, and click open.


Add Attachment
File to Attach (20MB Max)
Browse
Components of ChildPlus Manuals.docx
Service Area
Enrollment
Attachment Type
Description
Notes
Application
Attendance
Birth
Disability
Education
Enrollment
Health
Immunizations
Mental Health
Miscellaneous
PIR
Pregnancy
Transportation
Fees
Time-Saving Tips
Save and Add Another
Save
Cancel
Select the appropriate Service Area.
See the Attachment Categories section to determine where each type of document should be uploaded.


Add Attachment
File to Attach (20MB Max)
Browse
Components of ChildPlus Manuals.docx
Service Area
Enrollment
Attachment Type
Description
Notes
Health File
Health History & Nutrition Assessment
Health Screening Results
Home Visit Record
IEP Documentation
IFSP Documentation
Immunization Record
Incident Report
Income Documentation
In-Kind Donation Receipt
Insurance Documents
Lead & Hemoglobin Screening Results
Medical Records
Monitoring Observation
Other
Time-Saving Tips
Save and Add Another
Save
Cancel
Select the appropriate Attachment Type.
See the Attachment Categories section to determine where each type of document should be uploaded.

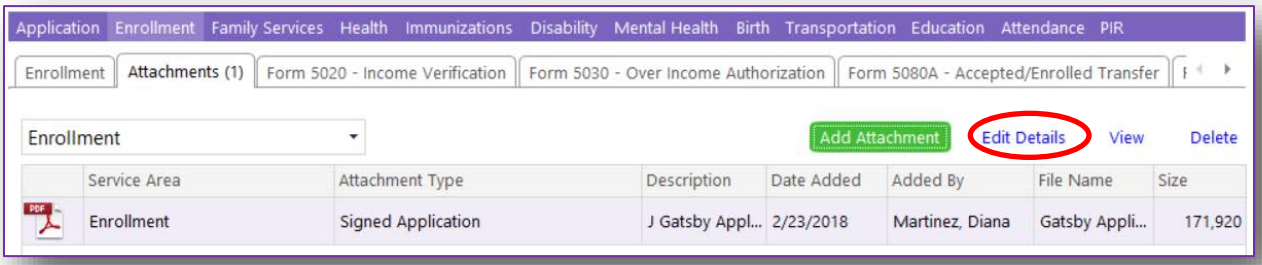

Enter the Description
The description for Home Visits should match the example below.
Add Attachment
File to Attach (20MB Max)
Browse
Gatsby Home Visit Lesson Plan 7-25-201
Service Area
Family Services
Attachment Type
Home Visit Record
Description
Home Visit Lesson Plan 7-18-2018
Enter comprehensive notes OR enter a summary of the Home Visit and upload the documentation as an attachment.
Notes
Time-Saving Tips
Save and Add Another
Save
Cancel
Click this button for tips on attachments.

Viewing Attachments

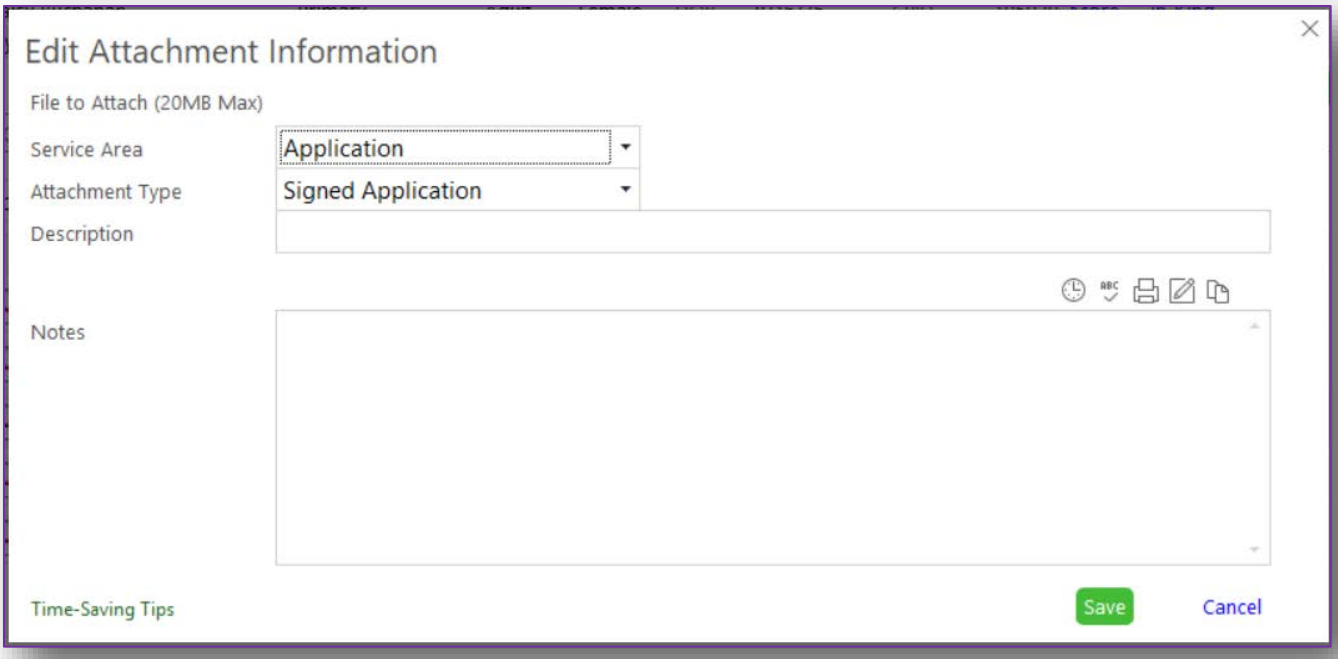


Select a file using the mouse, and click view. Alternately you may double click the file.

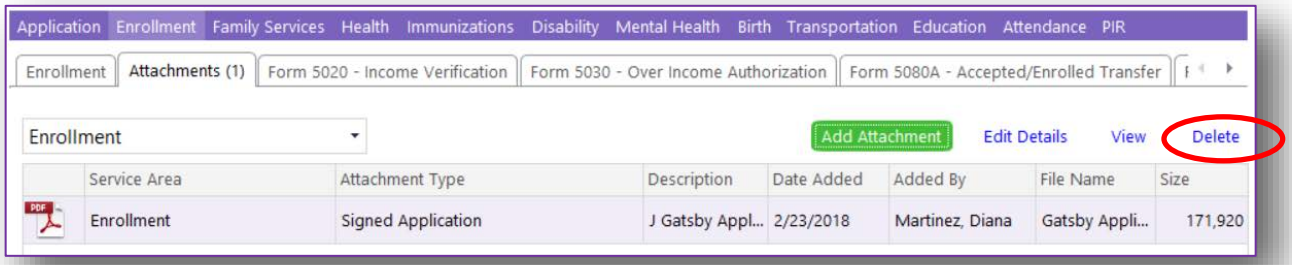
Editing Details



Select a file using the mouse, and click Edit Details. The box below will appear, and follows the same guidelines as Adding an Attachment.

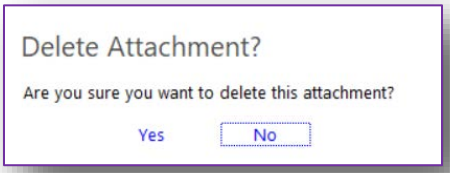


Deleting Attachments



Select a file using the mouse, and click Delete. The system will ask you to verify that you want to delete the attachment.

<u>This action cannot be undone.</u>



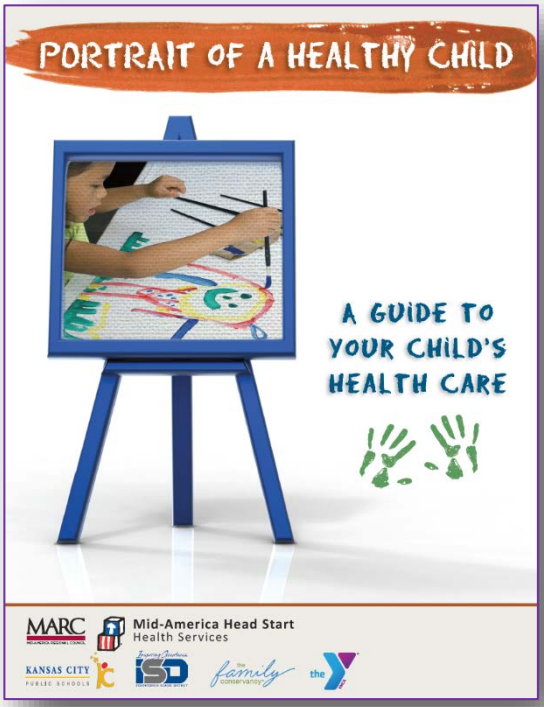
Attachment Categories

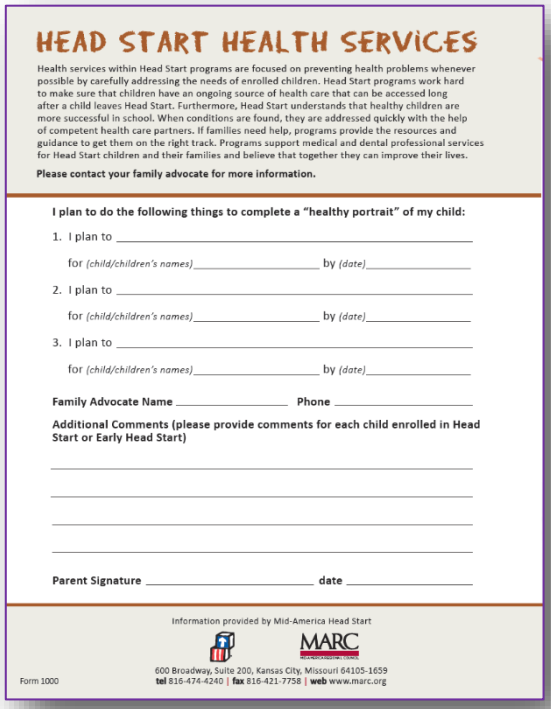
<u>Application</u>	**<u>Enrollment</u>**	**<u>Family Services</u>**
Application Signed by Staff & Parent Signed ChildPlus Eligibility Verification Proof of Birth/Proof of Pregnancy Proof of Residence Custody Documents	ALL Income Documentation Forms 5020 (if sibling) Forms 5170 (if paper copy needed)	Home Visit Lesson Plan (Home Visit Record with date) Family Partnership Agreement (FPA)
<u>Health</u>	**<u>Disabilities</u>**	
Portrait of a Healthy Child Insurance Card Physical Exam Dental Exam Health Information Exchange Release of Information Health History & Nutrition Assessment (if paper copy needed) Lead & Hemoglobin Screening Results Immunizations Individual Health Care Plan (IHCP) Asthma Action Plan (AAP)	Individualized Education Plan (IEP) Individualized Family Service Plan (IFSP)	

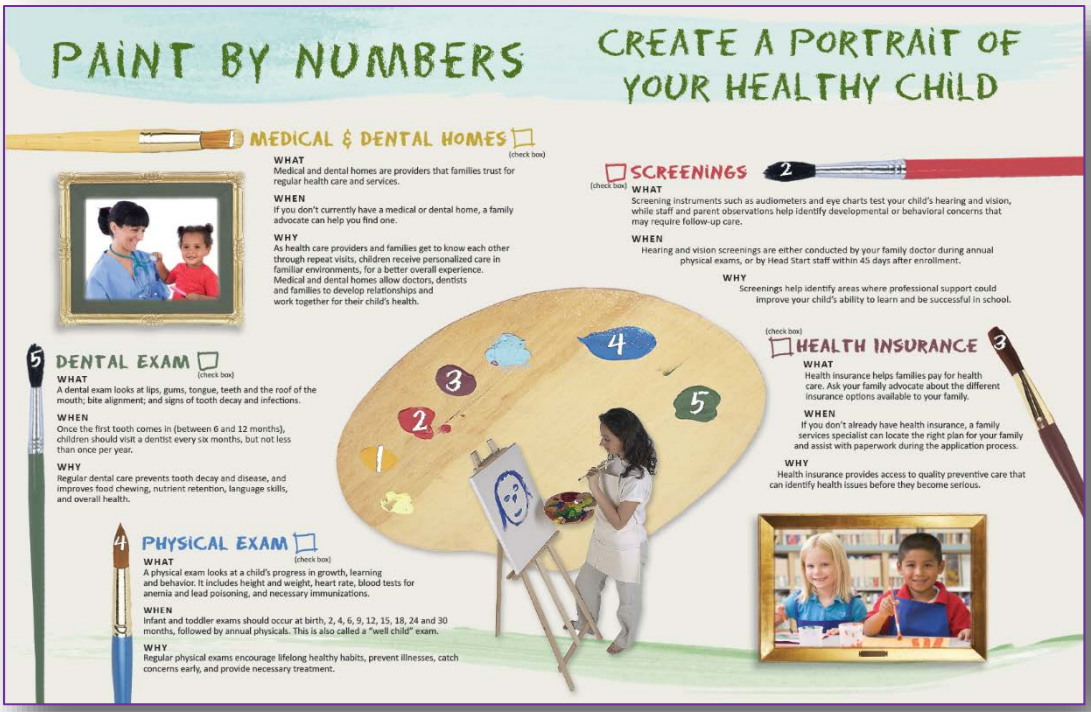
Portrait of a Healthy Child Module

Intake/Returning Students

At time of intake and during the review and update process for returning children, when determining the health needs of each participating child, the Portrait of a Healthy Child (PoHC) will be used to provide education and guidance for meeting the health requirements.



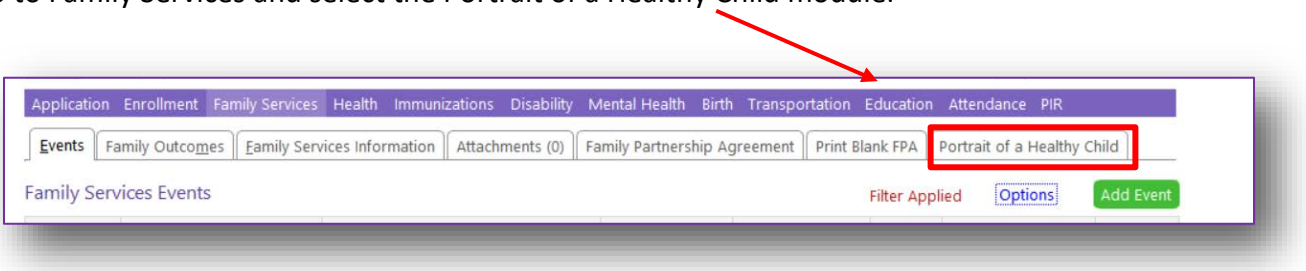




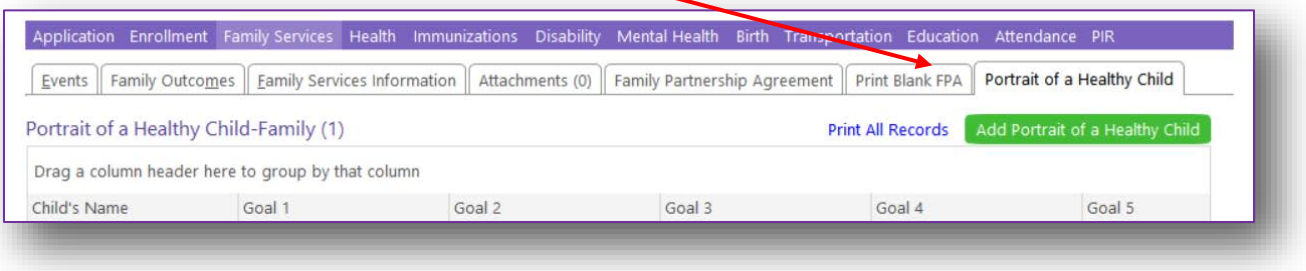
Needs identified and goals developed must be documented in ChildPlus in the Portrait of a Healthy Child (PoHC) module within the Family Services section.

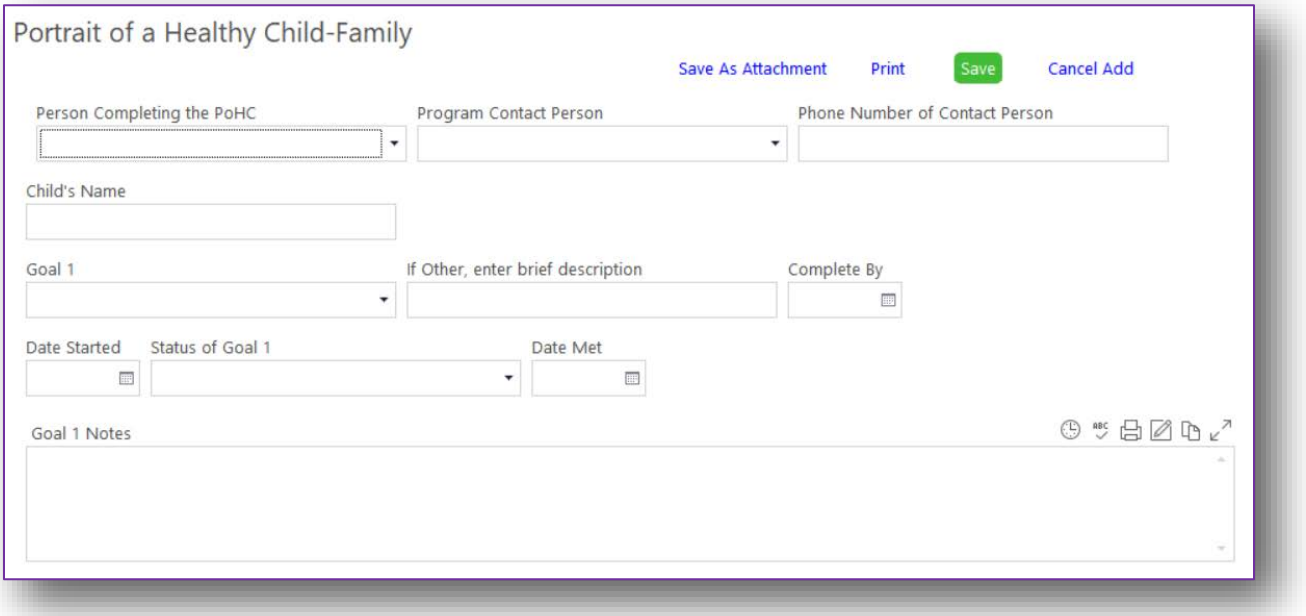
Each child should have their own ChildPlus PoHC module within Family Services.

Go to Family Services and select the Portrait of a Healthy Child module.



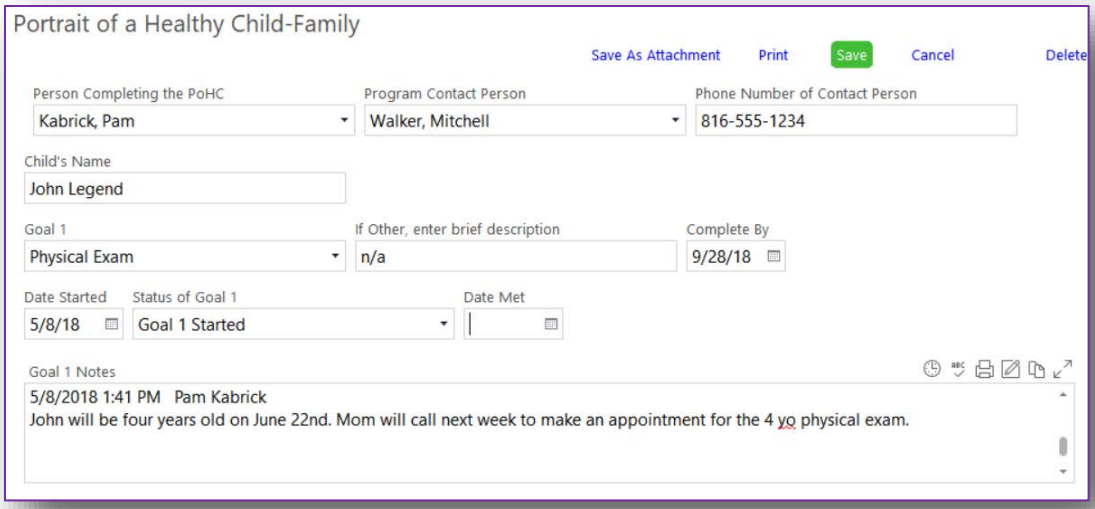
Select Add Portrait of a Healthy Child



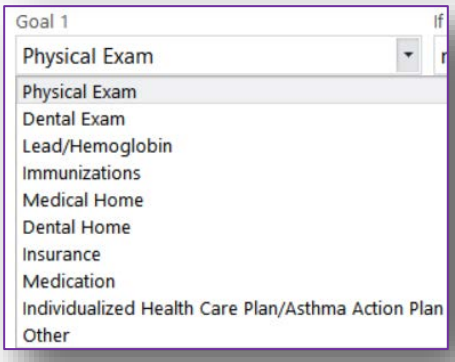


Complete information:

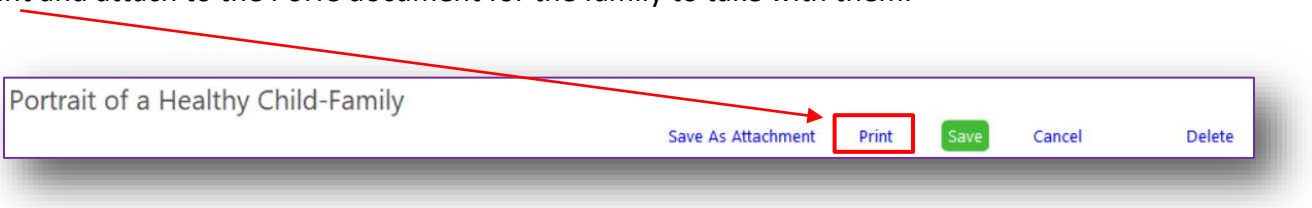
- Person Completing the PoHC at intake-select the name of the person
- Program Contact Person-if known, select the name of the person.
- Phone Number of Contact Person-if known, enter phone number
- Child's Name as entered in ChildPlus
- Goal 1-select from the dropdown menu. If options do not reflect the goal, select Other
- If Other is selected from the dropdown menu, enter a brief description. A more detailed description will be entered in Notes.
- Complete By-Select the date the family indicates they will meet the goal
- Date Started-the date Intake Specialist met with family and developed goals
- Status of Goal 1-select the status Goal 1 Started
- Notes-date stamp and enter notes that clearly reflect specific information about the goals developed to meet health requirements and follow up contact. Develop notes using SOAP style documentation.
    - S-Subjective O-Objective A-Assessment P-Plan
- Signature-parent/guardian signs to acknowledge agreement



Dropdown choices for goals



Print and attach to the PoHC document for the family to take with them.



Orientation

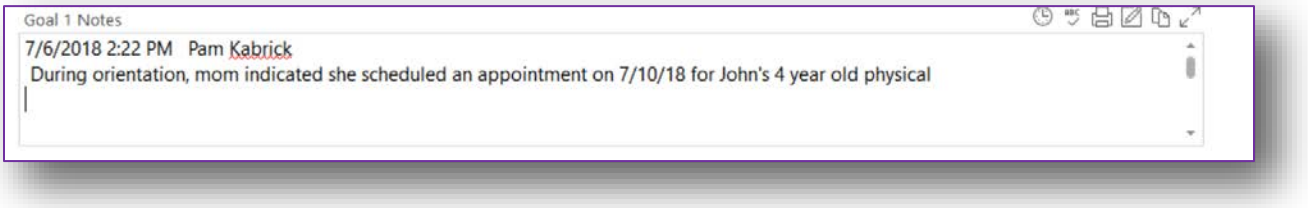
At the time of orientation, program staff will review data entered in the Portrait of a Healthy ChildPlus Module to determine if any goals have been met and/or if any resources are needed.

Update accordingly in the Portrait of a Healthy Child Module in Family Services.

Add information about progress towards meeting any goals identified at intake in the associated goal in the Notes.

Date stamp and enter notes that clearly reflect specific information about the goals developed to meet health requirements and follow up contact. Develop notes using SOAP style documentation.

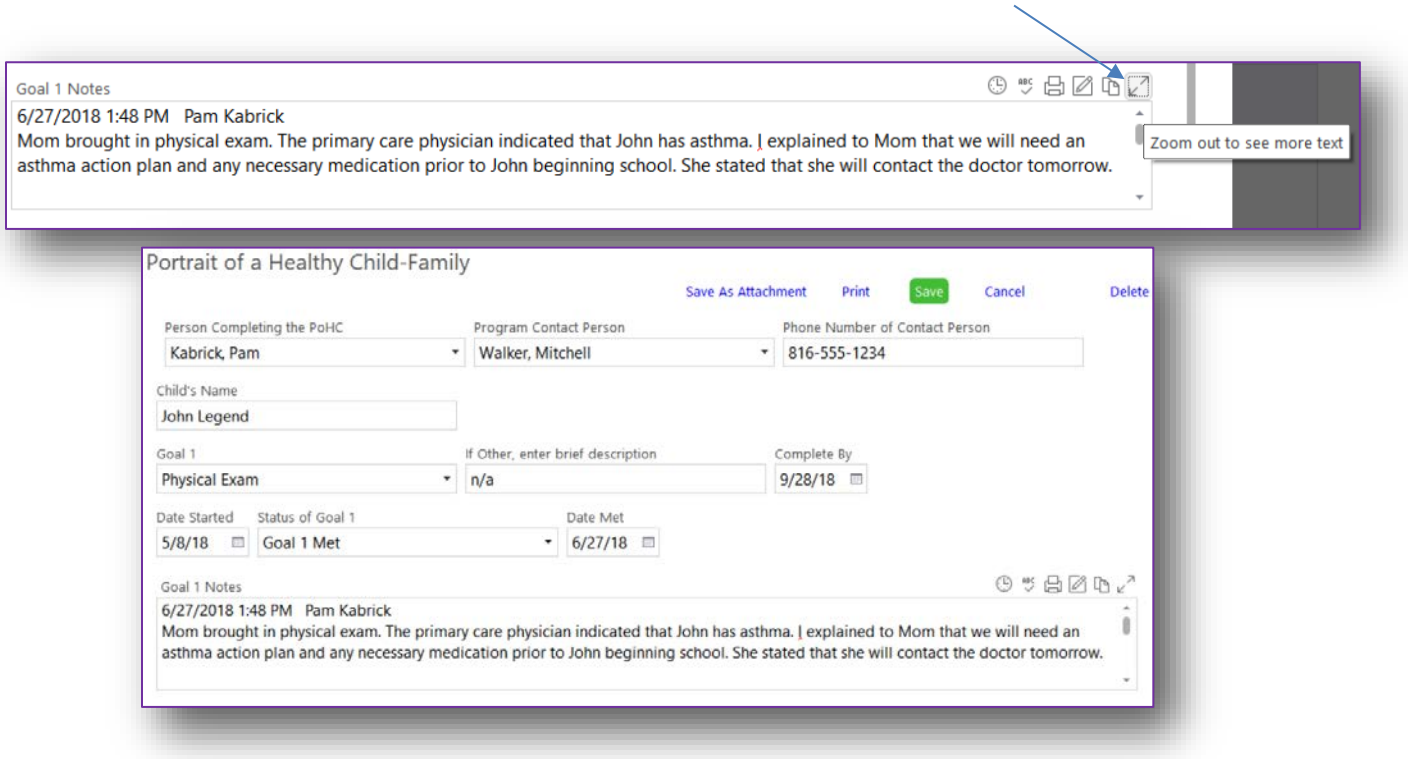
- S-Subjective O-Objective A-Assessment P-Plan



Ongoing Communication with families

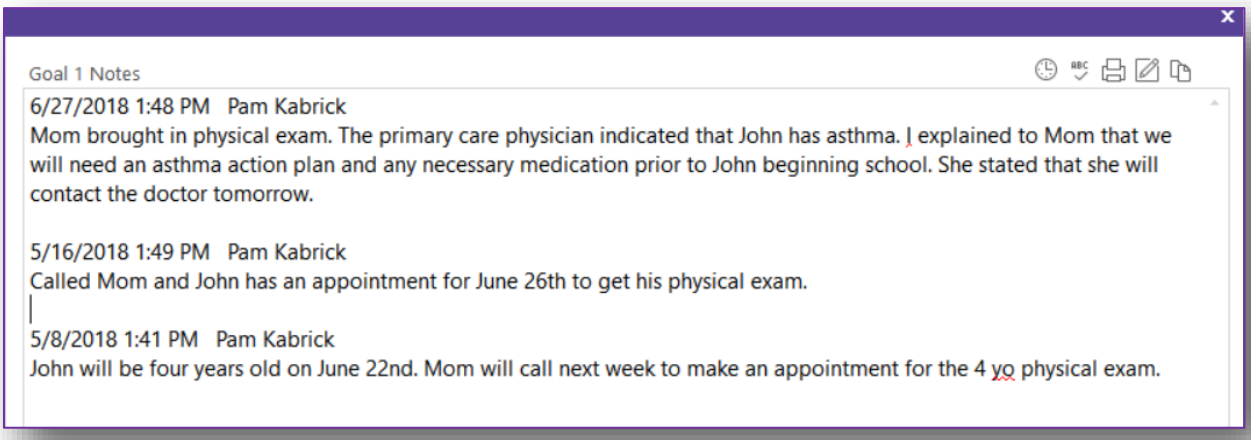
Regardless of the role of the staff person, each contact that is made with the family or a provider should be reflected in the notes until the PoHC goal is met.

The Notes box can be expanded to show all notes entered. Select the icon with two arrows to zoom out.



Once documentation to meet the goal is received, update Goal 1:

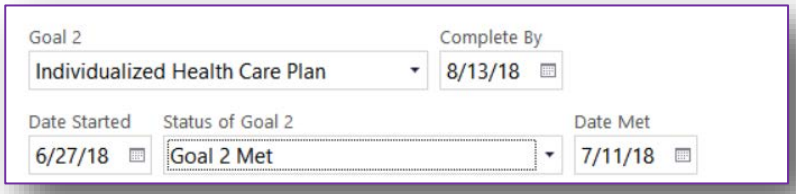
- Change the Status of Goal 1 to Goal 1 Met
- Select the Date Met
- Select Date Stamp and enter notes

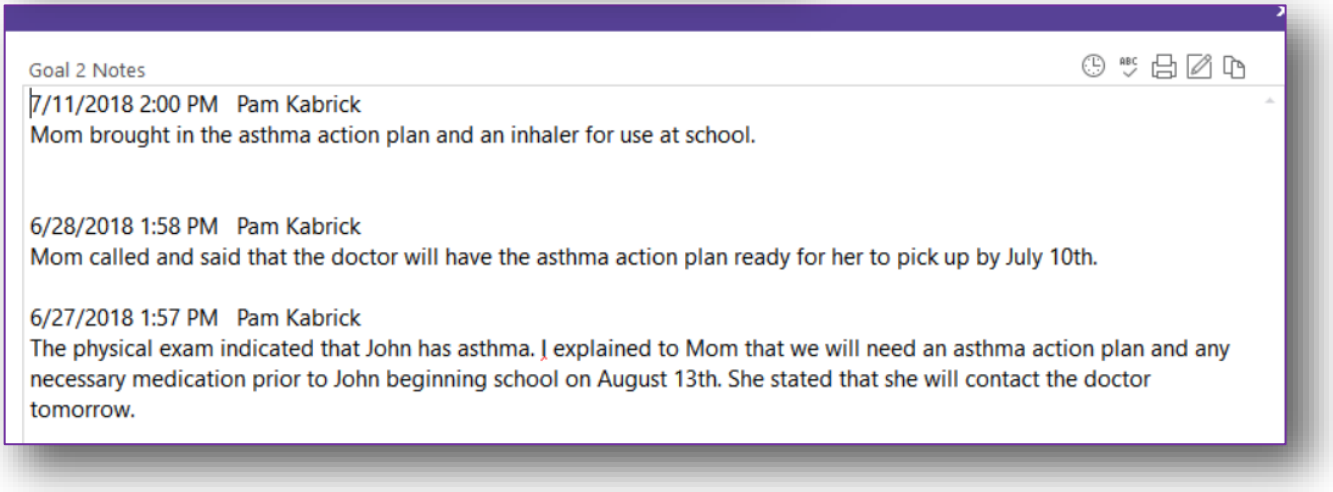


Tier 3 direct service providers: Don't forget to enter health records received in the Health Module in ChildPlus.

Tier 1 & 2 direct service providers: Submit health records, if received on-site, to the Head Start Data Team at hsdatateam@MARC.ORG to be entered into ChildPlus.

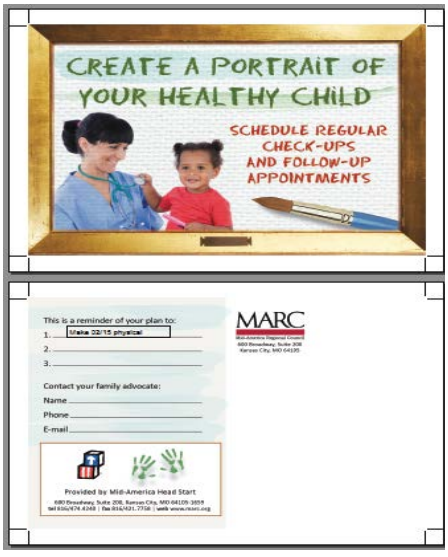
If there is any follow up required from the original PoHC goals, such as cavities to fill or obtaining an asthma action plan, create a new goal.





Portrait of a Healthy Child postcard

Use the Portrait of a Healthy Child postcard to remind parents of health events that are due.

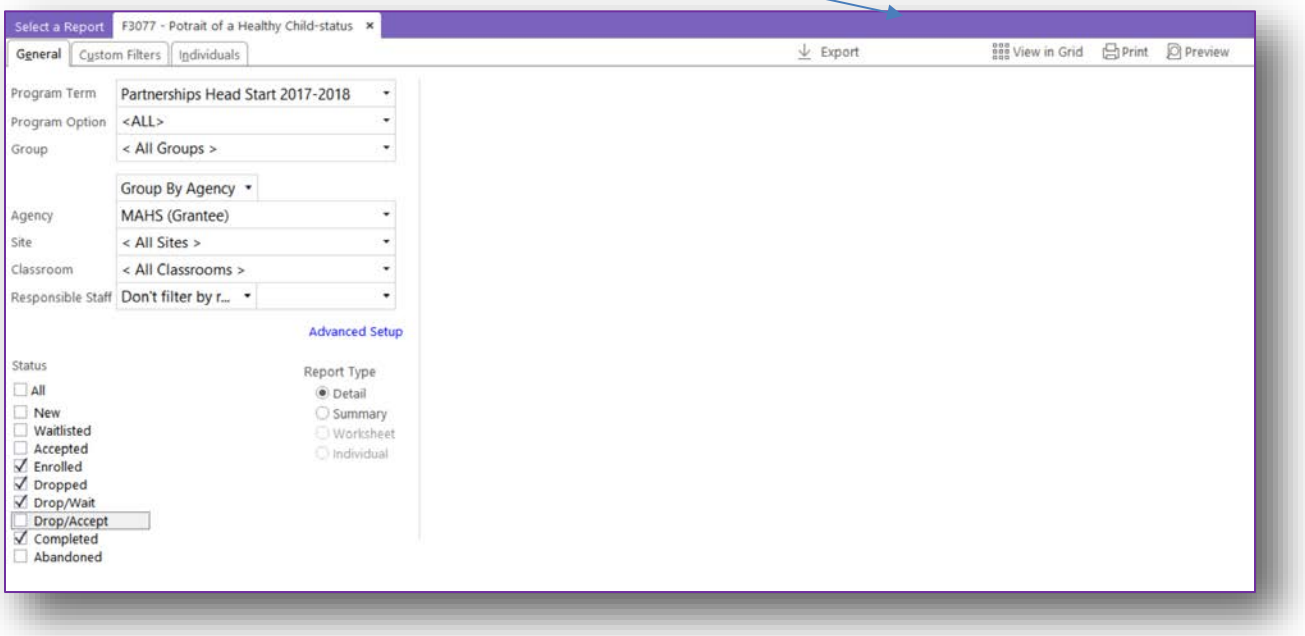


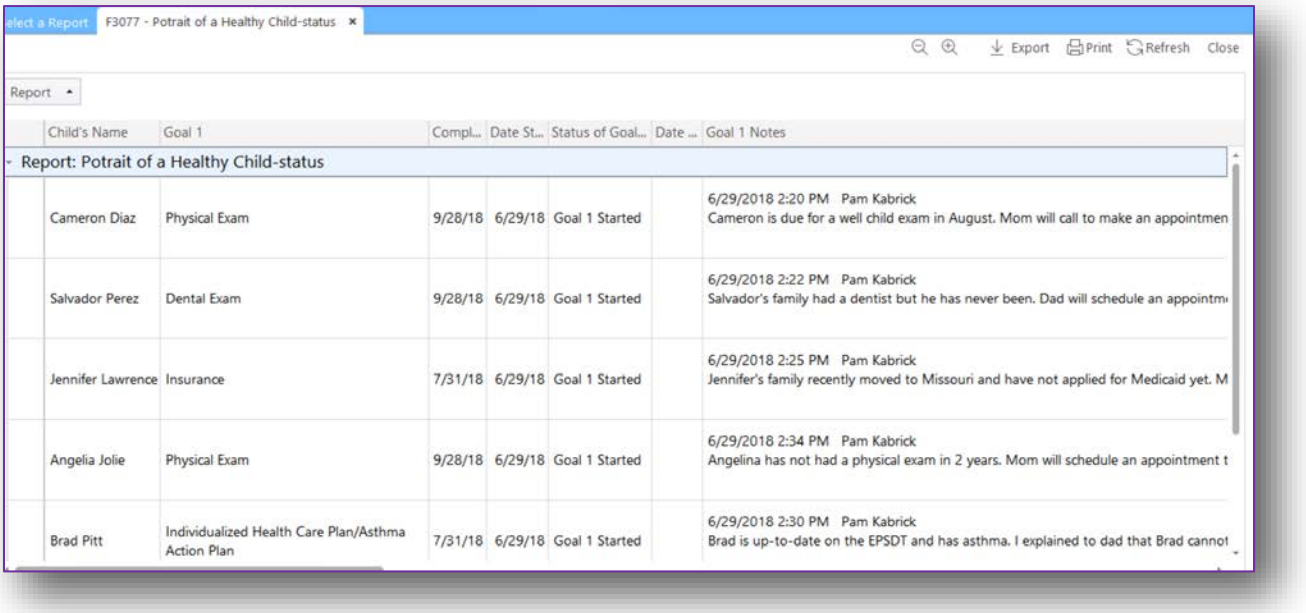
ChildPlus reports

F3077 for the status of PoHC goals

To determine the status of goals entered in PoHC module, run report F3077

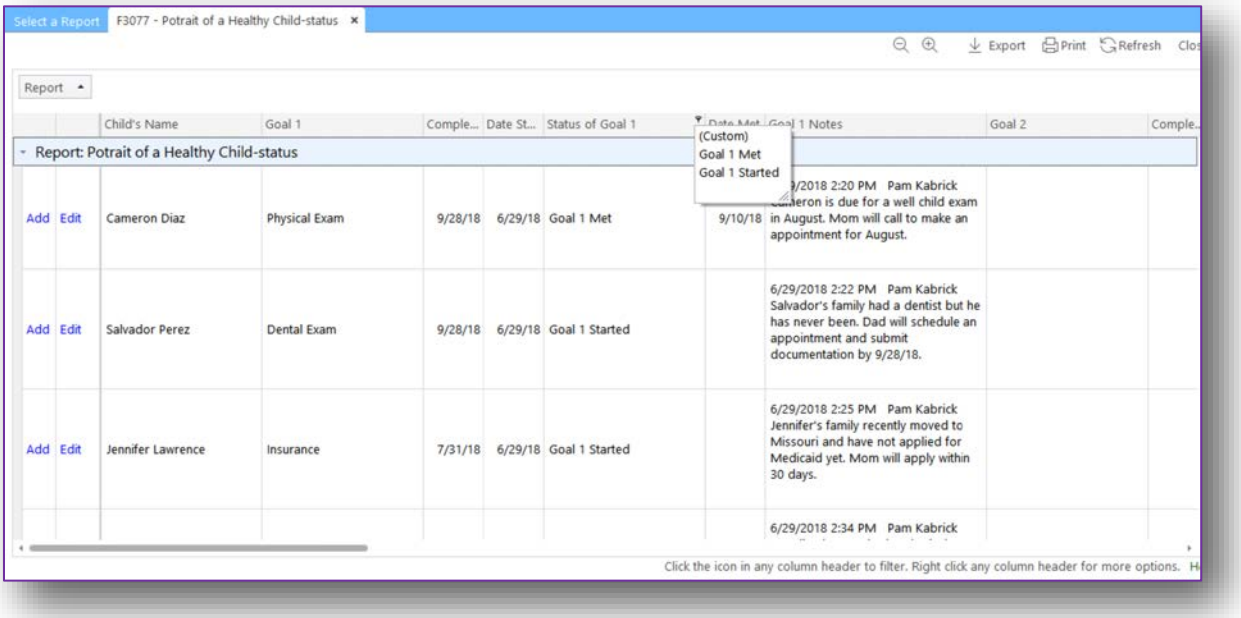
- Select Enrolled, Dropped, Drop/Wait and Completed
- Select View in Grid

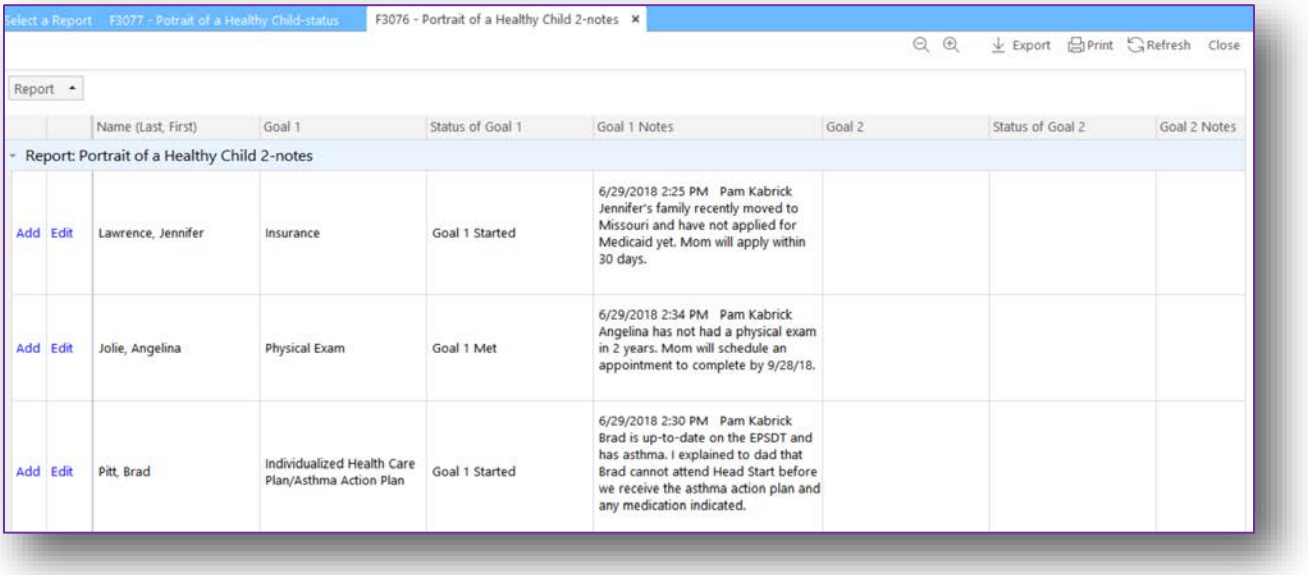




When running a report by View in Grid, it can be filtered by the data entered.

In the example below, the Status of Goal 1 has been selected and the choices for filtering are shown.



F3076 for notes

This report allows you to run a report with a focus on the Notes.