**Procedures for Data Entry Child Plus**

**and Entry Express**

***HSPPS 1302.52 (a-d) Family partnership services***

***Family Services, Events Tab***

* Click ***Services*** on the far left; select the child from the list of participants below or search for the child by name or birthdate using the search bar.
* Click ***Family Services*** (third from the left)
* Click ***Events*** on the left

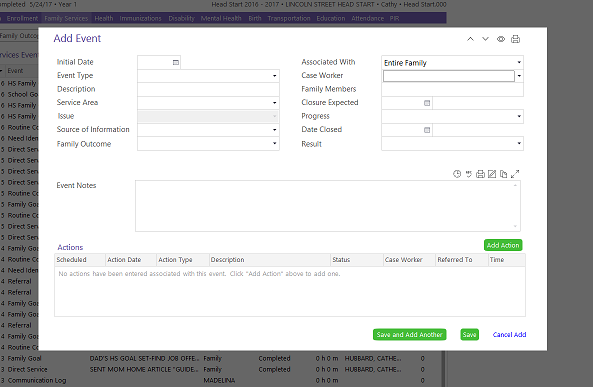
**\**Shortcut******for designating Case Worker*** *-* Click ***Family Services*** ***Information*** tab; go to the drop down list of names. Begin typing Case Worker last name and click enter when correct name appears OR click scroll down arrow for list of names and click enter. ***Click “Save” when finished***

Thereafter, the correct name will automatically populate each time you “***Add Event & ADD Action***.”

**Dual Enrolled families**: Enrolled in EHS *and* HS, **EHS will initiate/complete the Family Partnership Agreement and Family Outcomes Too**l in Child Plus & provide copies to Head Start Teacher for supporting the family & for the child file.

**Adding an Event:**You will “***Add Event***” in the Family Services section of Child Plus for the following:

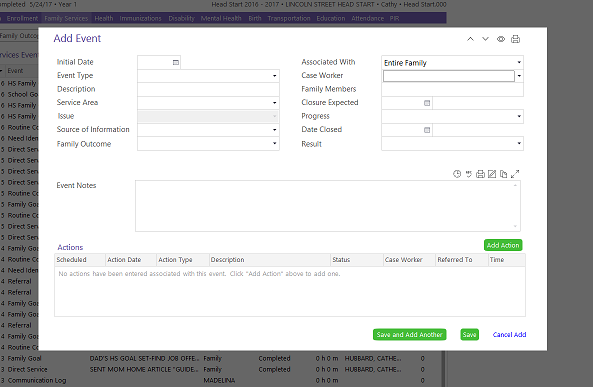
1. **Home Visits –** Documenting home visits **(For FES)**
2. **Need Identified –** The family has a need requiring support through direct service or referral.
   * ***Direct Services***
   * ***Referrals*** *(Includes CPS referrals made by staff)*
   * ***School Readiness Goal*** The family is establishing School Readiness Goals (Child Development). Support of a referral or direct service may not apply.
   * ***Communication which needs documenting such as***
     + ***CPS involvement*** *(Staff made a CPS referral; OR staff did not make a referral, but CPS called and/or observed at school for information or to give information).*
     + ***Chronic absenteeism*** *(Follow up within Attendance Tab; See ChildPlus Direct Entry Attendance Follow Up - FES Instructions)*
3. **Family Partnership Agreement Goal Process-** The family is establishing FPA goals.



1. **Home visit Complete (FES)**

* **Click Add Event**
* **Initial Date:** when **home visit** took place
* **Event Type:** Enter ***Home Visit***
* **Description:** Enter ***Home Visit Completed***
* **Service Area:** Social Service
* **Issue:** Leave blank
* **Source of Information:** Leave blank
* **Family Outcome:** These are the areas of the HS Parent Family and Community Engagement Framework. ***Choose only 1 that applies***. **[1302.52 (b)]**
* **Associated With:** This will be auto-filled
* **Case Worker:** Drop down list of names\* *Begin typing your last name & click when your name appears*.
* **Family Members**: Leave blank
* **Closure Expected:** Leave blank
* **Progress:** Click *Completed (Date completed)*
* **Date Closed:** Date Completed
* **Result:** leave blank

**Action Notes:** Use time stamp each time an entry is made. This area can be used to provide additional detail about identified need. ***Click “Save” when finished***



**Home Visit Missed (HVM)**

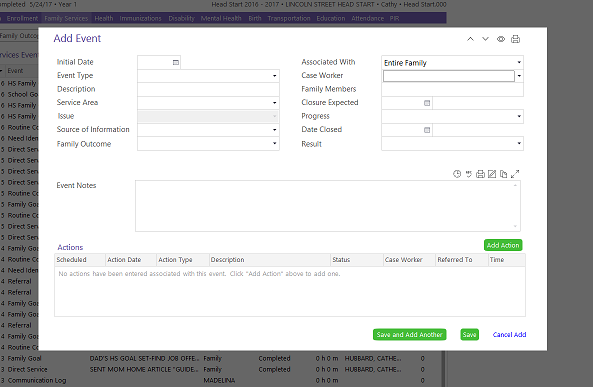
**Chronic cancelling or nobody home. Takes place after 2nd HV missed or Cancelled.**

* ***Add Event***
* **Initial Date:** When **home visit** was scheduled.
* **Event Type:** Click ***Home Visit***
* **Description:** Enter Home Visit Missed OR HVM
* **Service Area:** Social Services
* **Issue:** Leave blank
* **Source of Information:** Leave blank
* **Family Outcome:** These are the areas of the HS Parent Family and Community Engagement Framework. ***Choose only 1 that applies***. **[1302.52 (b)]**
* **Associated With:** Leave blank
* **Case Worker:** Drop down list of names\* *Begin typing your last name & click when your name appears*.
* **Family Members**: Leave blank
* **Closure Expected:** Leave blank
* **Progress:** *Click Cancelled*
* **Date Closed:** *Date Cancelled*
* **Result:** leave blank

**Action Notes:** Use time stamp each time an entry is made. Use this to provide additional details about **HVM**. ***Ex. - Original dates should be identified for when hv was scheduled with description; mom called to cancel on \_\_\_\_\_\_ (date) because \_\_\_\_\_\_\_\_\_\_\_\_.***

***Click “Save” when finished***

1. **Need Identified** (Family has a ***Need Identified*** that requiring support through ***Direct Service OR Referral). School Readiness Goals may not require a Direct Service or a Referral.***

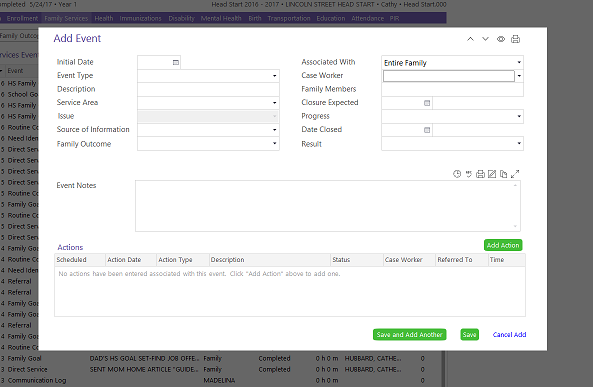


***There are 3 different and separate event types for Need Identified***

1. ***Family Goal***
2. ***Home Visit***
3. ***Need Identified, which includes:***
   * ***Direct Services***
   * ***Referrals*** *(Includes CPS referrals made by staff)*
   * ***School Readiness Goal***
   * ***Communication which needs documenting such as***
     + ***CPS involvement*** *(Staff made a CPS referral; OR staff did not make a referral, but CPS called and/or observed at school for information or to give information).*
   * ***chronic absenteeism*** *(Follow up within Attendance Tab; See ChildPlus Direct Entry Attendance Follow Up - FES Instructions)*

***The first time you enter Need Identified:***

1. ***Add Event first***
2. ***ADD Action second***

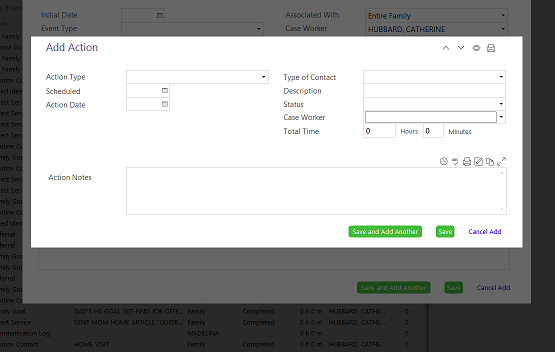


***Direct Service*:**

Staff provided a ***Direct Service*** (To meet ***Need Identified***; Examples: a requested handout or children’s social story or social emotional book related to a topic; A one-to-one “mini training,” which needs to be added to **PIR** fields of ***Need Identified*** & ***Parenting Education***) Other examples - budgeting, cooking, positive guidance, child development, etc; OR parenting support from (Your Journey Together parenting curriculum), Conscious Discipline or parenting guidance that is “individualized” for situation (not the same handout provided to all families).

* **Click Add Event**
* **Initial Date:** Date of ***Need Identified***
* **Event Type:** Enter ***Need Identified***
* **Description:** Enter description of need.
* **Service Area:** Social Services
* **Issue:** Choose appropriate within scroll down menu
* **Source of Information:** Choose appropriate within scroll down menu
* **Family Outcome:** These are the areas of the HS Parent Family and Community Engagement Framework. ***Choose only 1 that applies***. **[1302.52 (b)]**
* **Associated With:** This will be auto-filled
* **Case Worker:** Drop down list of names\* *Begin typing your last name & click when your name appears*.
* **Family Members**: Leave blank
* **Closure Expected:** Leave blank
* **Progress:** In Progress, Cancelled or *Completed (Date completed)*
* ***Cancelled*** is only by the family if they no longer want the goal
* ***Complete*** *is when family goal is complete*
* ***In Progress*** *(Staff will progressively follow up on goal with the family)*
* **Date Closed:** Date Completed
* **Result:** Leave blank

**Action Notes:** Use time stamp each time an entry is made. This area can be used to provide additional detail about identified need. ***Click “Save” when finished***



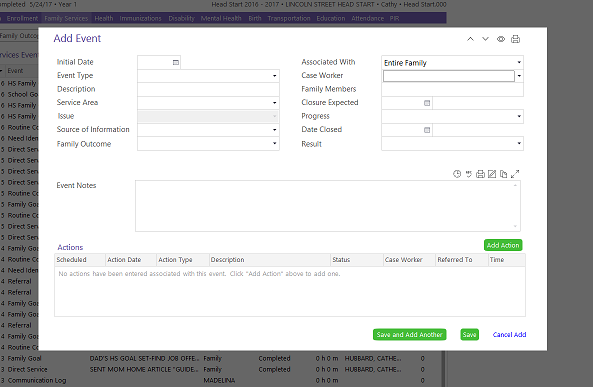
***Click Add Action:***

* **Action Type:** Scroll down arrow *(****Direct****)*
* **Scheduled:** Leave Blank
* **Action Date:** Date of ***Direct Service***
* **Type of Contact:** Scroll down arrow (Choose type of contact that applies)
* **Description:** Describe the Direct Service
* **Status:** Scroll down arrow (Referral is ***Action Completed, Family Cancelled or Ongoing)***
* ***Action Completed*** *is when referral service need is met. Mental Health Referrals are completed only when the mental health sessions are completed*
* ***Family Cancelled*** is only when family no longer wants ***Referral*** OR family is ineligible OR service is no longer available
* **Case Worker**: Begin typing last name & click enter when correct name appears OR click drop down list
* **Total Time**: leave blank

**Action Notes:** Timestamp entries. Use this area as a running log to provide any additional details and/or ongoing information related to the status of a referral. ***Click “Save” when finished***

**For accurate Reports & keeping *PIR* up to date, staff must do the following when providing a *Direct Service* of (giving a “mini training”)**

* ***Go to Family Services Information tab***
* ***Scroll down to area of Needs we refer families for***
* ***Go to Need Identified box & click yes***
* ***If Direct Service “mini training” is complete:***
  + ***Go to appropriate Services Received boxes & click yes***



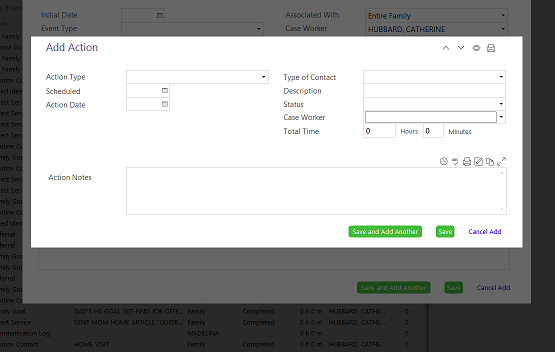
**Referral:**

A referral is being made to meet ***Need Identified***

***Click Add Event***

* **Click Add Event**
* **Initial Date:** Date of ***Need Identified***
* **Event Type:** Enter ***Need Identified***
* **Description:** Enter description of need.
* **Service Area:** Social Services
* **Issue:** Choose appropriate within scroll down menu
* **Source of Information:** Choose appropriate within scroll down menu
* **Family Outcome:** These are the areas of the HS Parent Family and Community Engagement Framework. ***Choose only 1 that applies***. **[1302.52 (b)]**
* **Associated With:** This will be auto-filled
* **Case Worker:** Drop down list of names\* *Begin typing your last name & click when your name appears*.
* **Family Members**: Leave blank
* **Closure Expected:** Leave blank
* **Progress:** In Progress, Cancelled or *Completed (Date completed)*
* ***Cancelled*** is only by the family if they no longer want the goal
* ***Complete*** *is when family goal is complete*
* ***In Progress*** *(Staff will progressively follow up on goal with the family)*
* **Date Closed:** Date Completed
* **Result:** leave blank

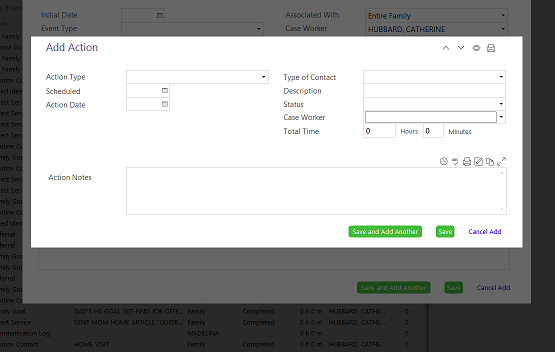
**Action Notes:** Use time stamp each time an entry is made. This area can be used to provide additional detail about identified need. ***Click “Save” when finished***



***Click Add Action***

* **Action Type:** Scroll down arrow *(****Referr****al)*
* **Scheduled:** Leave Blank
* **Action Date:** Date of ***Referral***
* **Type of Contact:** Scroll down arrow (Choose type of contact that applies)
* **Description:** Where the ***Referral*** is made to (Keep each referral as separate ***Add Actions;*** Ex – Heat Assistance to DHHS and NMCAA would be separate ***Add Actions***)
* **Status:** Scroll down arrow (Referral is ***Action Completed, Family Cancelled or Ongoing)***
* ***Action Completed*** *is when referral service need is met. Mental Health Referrals are completed only when the mental health sessions are completed*
* ***Family Cancelled*** is only when family no longer wants ***Referral*** OR family is ineligible OR service is no longer available
* **Case Worker**: Begin typing last name & click enter when correct name appears OR click drop down list
* **Total Time**: leave blank

**Action Notes:** Timestamp entries. Use this area as a running log to provide any additional details and/or ongoing information related to the status of a referral. ***Click “Save” when finished***



***Referral Follow Up***

*Same process for School Readiness Goal & Family Goal Follow Up*

Staff must follow up on ***Referral*** *within 30-45 days Immediate needs should be followed up asap*

* Go to original event entered & open

***Click Add Action***

* **Action Type:** Scroll down arrow *(****Follow Up****)*
* **Scheduled:** If you know date of appointment, you can enter it
* **Action Date:** ***Follow Up*** date
* **Type of Contact:** Scroll down arrow (Choose type of contact you had for ***Follow Up***)
* **Description:** Describe the outcome of ***Follow Up***
* **Status:** Scroll down arrow (Referral is ***Action Completed, Family Cancelled or Ongoing)***
* ***Action Completed*** *is when referral service need is met. Mental Health Referrals are completed only when the mental health sessions are completed*
* ***Family Cancelled*** is only when family no longer wants ***Referral*** OR family is ineligible OR service is no longer available
* ***Ongoing*** *Is until there is an outcome of either* ***Action Completed*** *or* ***Cancelled***
* **Case Worker**: Begin typing last name & click enter when correct name appears OR click drop down list
* **Total Time**: leave blank

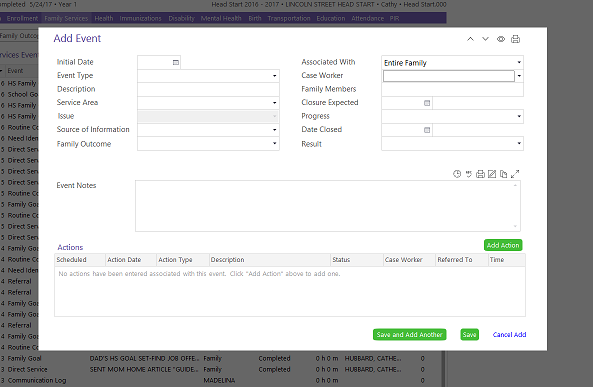
**Action Notes:** Timestamp entries. Use this area as a running log to provide any additional details and/or ongoing information related to the status of a referral. ***Click “Save” when finished***

**When Referral is Completed or Cancelled**:

* Go to original ***Event*** entry, and change from ***In Progress*** to ***Completed*** or ***Cancelled***.
* **Date Closed:** Enter date ***Completed*** or ***Cancelled***

**For accurate Reports & keeping PIR up to date, staff must do the following when making** ***Referrals:***

* ***Scroll down to area of Needs we refer families for***
* ***Go to Need Identified box & click yes***
* ***If Referral is complete:***
  + ***Go to Services Received box & click yes***



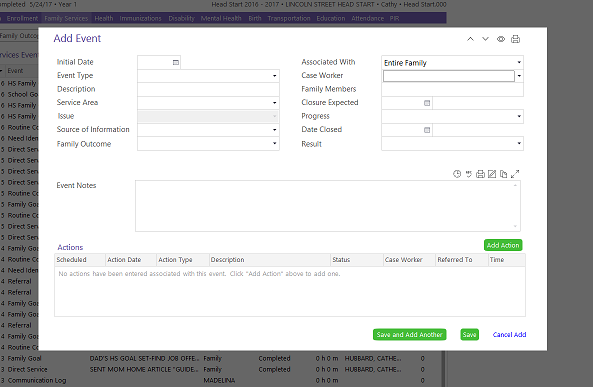
***School Readiness Goal*** The family is establishing School Readiness Goals (Child Development). School Readiness Goal follow up occurs at home visits, PTC, and if appropriate during phone or center contacts. ***Add Action***. (See above Referral Follow Up instructions, because it’s the same ***Add Action*** process.) ***Referral*** or ***Direct*** ***Service*** may not apply to School Readiness Goal; If it does apply, then follow the ***Referral Add Action*** *process.*

* **Click Add Event**
* **Initial Date:** Date of ***Need Identified***
* **Event Type:** Enter ***Need Identified***
* **Description:** Enter description of ***School Readiness Goal***(s)
* **Service Area:** Social Services
* **Issue:** Child Development (Child goal)
* **Source of Information:** Choose appropriate within scroll down menu
* **Family Outcome:** These are the areas of the HS Parent Family and Community Engagement Framework. ***Choose only 1 that applies***. **[1302.52 (b)]**
* **Associated With:** This will be auto-filled
* **Case Worker:** Drop down list of names\* *Begin typing your last name & click when your name appears*.
* **Family Members**: Leave blank
* **Closure Expected:** Leave blank
* **Progress:** In Progress, Cancelled or *Completed (Date completed)*
* ***In Progress*** *(Staff will progressively follow up on goal with the family)*
* ***Complete*** *is when family goal is complete*
* ***Cancelled*** is only by the family if they no longer want the goal
* **Date Closed:** Date when school readiness goal is accomplished or in cancelled
* **Result:** Leave blank

**Action Notes:** Timestamp entries. Use this area as a running log to provide any additional details and/or ongoing information related to the status of a referral. ***Click “Save” when finished***

**When School Readiness Goal is Completed or Cancelled**:

* Go to original ***Event*** entry, and change from ***In Progress*** to ***Completed*** or ***Cancelled***.
* **Date Closed:** Enter date ***Completed*** or ***Cancelled***



***Communication which needs documenting:***

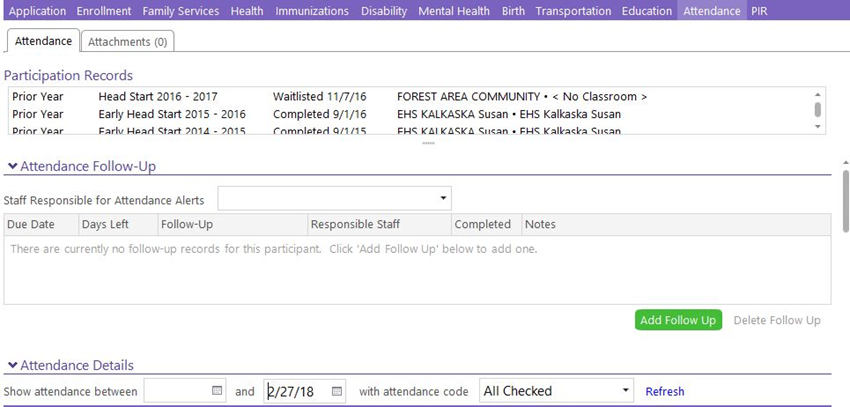
* ***CPS involvement*** *(Staff made a CPS referral; OR Staff did not make a referral, but CPS called and/or observed at school for information or to give information).*
* **Click Add Event**
* **Initial Date:** Date of ***Need Identified***
* **Event Type:** Enter ***Need Identified***
* **Description:** Enter description of communication topic
* **Service Area:** Social Services
* **Issue:** Choose most appropriate topic
* **Source of Information:** Choose appropriate from scroll down menu
* **Family Outcome:** These are the areas of the HS Parent Family and Community Engagement Framework. ***Choose only 1 that applies***. **[1302.52 (b)]**
* **Associated With:** This will be auto-filled
* **Case Worker:** Drop down list of names\* *Begin typing your last name & click when your name appears*.
* **Family Members**: Leave blank
* **Closure Expected:** Leave blank
* **Progress:** In Progress, Cancelled or *Completed (Date completed); Mostly this filed will either be* ***In Progress or Complete***
* ***In Progress*** *(Staff will progressively follow up on goal with the family)*
* ***Complete*** *is when family goal is complete*
* ***Cancelled*** is only by the family if they no longer want the goal
* **Date Closed:** Date of communication or CPS called or CPS observed
* **Result:** Leave blank

**Action Notes:** Use time stamp each time an entry is made. This area can be used to provide additional detail about identified need. ***Click “Save” when finished***

***Chronic Absenteeism also needs documenting:***

* **Either select child from your Attendance Dashboard or via the Attendance tab**
* **Click on Add Follow Up**
* **Select Due Date**
* **Choose the kind of follow up:**
* Attendance Plan
* Follow Up Required
* Multiple Absences
* Multiple Tardies
* Percentage of Attendance
* **Enter the responsible staff person’s name for the specified attendance follow up.**
* **Enter whether or not the follow up has been completed.**
* **Within the Notes section, tell the story of what happened.**
* An example for the Notes section would be to document that a home visit occurred and what was addressed.
* Another example for the Notes section might be to include what a family shares regarding a barrier to attending regularly and any plans created to address the barrier. If follow up to the barrier is tracked in Family Services tab, note “See Family Services tab”**Save when finished**

**Step 1**

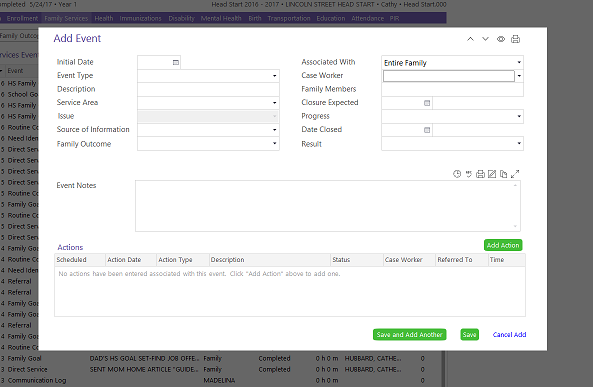
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**Step 3-7**

**Step 2**

**3) Family Partnership Agreement. [1302.52(a)]** This where we show details about the **Family Partnership Agreement (FPA).**

**Actions, such as *Direct Service* or *Referrals*, related to the FPA will be recorded in the “Add Action” section**.



* ***Add Event*** first as ***Family Goal***
* **Initial Date:** Date goal was set OR parent declined to set a goal.
* **Event Type:** ***Family Goal***
* **Description:** Write description of goal
* **Service Area:** Social Service
* **Issue:** Drop down menu for appropriate choice
* **Source of Information:** Choose appropriate from scroll down menu
* **Family Outcome:** These are the areas of the HS Parent Family and Community Engagement Framework. ***Choose only 1 that applies***. **[1302.52 (b)]**
* **Associated With:** This will be auto-filled
* **Case Worker:** *Begin typing your last name & click when name appears*, OR click drop down menu for names.
* **Family Members**: Leave blank
* **Closure Expected***: end of school year date.*
* **Progress:** ***In Progress,*** ***Complete*** *(Date completed) or* ***Cancelled***
* ***In Progress*** *(Staff will progressively follow up on goal with the family)*
* ***Complete*** *is when family goal is complete*
* ***Cancelled*** is only by the family if they no longer want the goal
* **Date Closed:** Date Completed or Cancelled
* **Result:** leave blank

**Action Notes:** Timestamp entries. Use this area as a running log to provide any additional details and/or ongoing information related to the status of a referral. ***Click “Save” when finished***

**When Family Goal is Completed or Cancelled**:

* Go to original ***Event*** entry and change from ***In Progress*** to ***Completed*** or ***Cancelled***.
* **Date Closed:** Enter date ***Completed*** or ***Cancelled***

**Completing the *Family Outcome Tool Needs Assessment***

* *Go to* ***Family Services***
* *Click* ***Family Outcomes*** *(Completed once)*
* *Click* ***Change who appears on list*** *(bottom left) and* **Select Program Year – HS or EHS 2020-21** so your list populates.
* ***Enter Results – select yes or no***
* Click **Save** when you are finished.

***AFTER FOT is completed: Go to Family Services Information Tab***

**For Accurate Reports & keeping *PIR* up to date, do the following direct entry:**

***Needs Assessment***

* ***Once FOT is completed -*** *Click yes for completed within the Family Services Tab*
* ***Click the date***
* ***Valid until –*** *End of school year*

***Needs Assessment Results***

* ***Needs Services –*** *Click yes if services needed are identified from completing the FOT*
* ***Received Agency Social Services –*** *Click yes if nmcaa services were received as a result of completing the FOT*
* ***Additional Community Services Needed –*** *Click yes if family/staff identify services needed as a result of completing the FOT*
* ***Referred to Another Agency –*** *Click yes if staff refers family to another agency for identified services needed as a result of completing the FOT*

**Home Practices and Routines**

* *Go to* ***Family Services***
* *Click* ***Family Outcomes Instrument (Family Outcomes Instrument is the Home Practices and Routines because it gives us “pre” and “post” data for time in our program).***
* *Make sure “EHS/HS 2020-21 School Year” is populated in the drop down box*
* *Click* ***Home Practices and Routines*** *–* ***Determine the Assessment Period – “First” or “Second”*** *– See the FOT and HP Guidance for further support.*
* *Click* ***“Enter Results”*** *under the appropriate assessment period*
* *Enter the date the assessment was completed next to* ***“Assessment Completed”***
* ***“Case Worker” Select the name of the person who reviews with the family***
* ***Enter Results – see scoring legend – Lower Score means greater need. 5 = 7 days per week; 4 = 5-6 days per week; 3 = 3-4 days per week; 2 = 1-2 days per week***
* ***For Confidence Level Scoring –*** *Note that the drop down options differ from the response options. Select the number that corresponds to the response provided.* ***Example – 5 = Calm***

***Family Partnership Agreement***

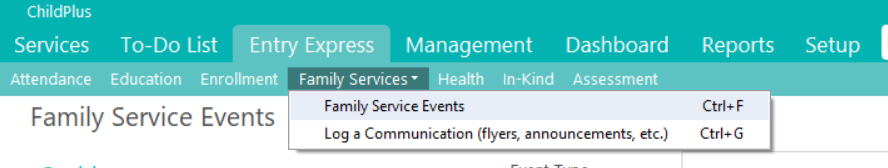
* + ***In Family Goal Setting Process -*** *Click yes, if the relationship building process with the family has begun after a home visit, even if a goal is not yet set.*
  + ***Family Partnership Agreement -*** *Click yes if a Family Partnership Agreement Goal is set.*
  + ***Effective Dates – first box*** *is for when a goal is set.* ***“to” box*** *End of school year date*
  + ***Family Partnership Notes -*** *Add if relevant*

***Child Plus – Entry Express Family Services Event***

**How to Enter a flier or resource shared with multiple families at one time.**

**Go to Entry Express**

**Select:** *Family Services Event*

**

***Select Which Participants to Include***

***Complete these fields****:*

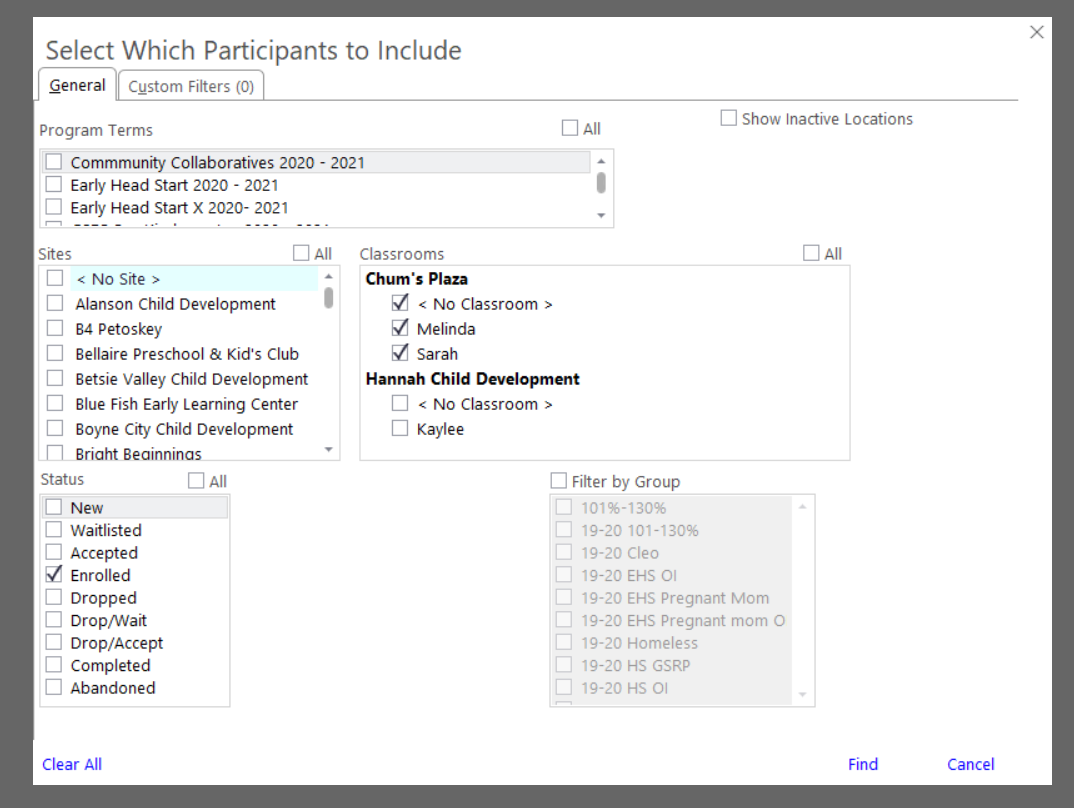
**Program Term:**Enter program term

**Sites:** Select the sites you want to include

**Classroom:** Select the classroom for the sites you selected

**Status:**  Select Enrolled

**Classrooms:** Put a check mark next to the classrooms you want to include

***Click Find at the Bottom of the Screen***

***Enter Family Service Event Details***

***First, you will want to select the children you want to enter information for.***

*You do not have to enter the event information for all children in the class list. If you want to enter the event for all children they will already have a check mark by their name when you get to this screen, If you click the box that says “uncheck al”, you will be able to clear all check marks and then only put a check next to the children whom you wish to enter the event for.*

***Then, Complete these fields****:*

**Initial Date:**Enter Date information was sent

**Event Type:** PFCE Resources (We were formerly calling this Need Identified)

**Description:** Cov19 ***AND*** *a brief description of what information was shared*

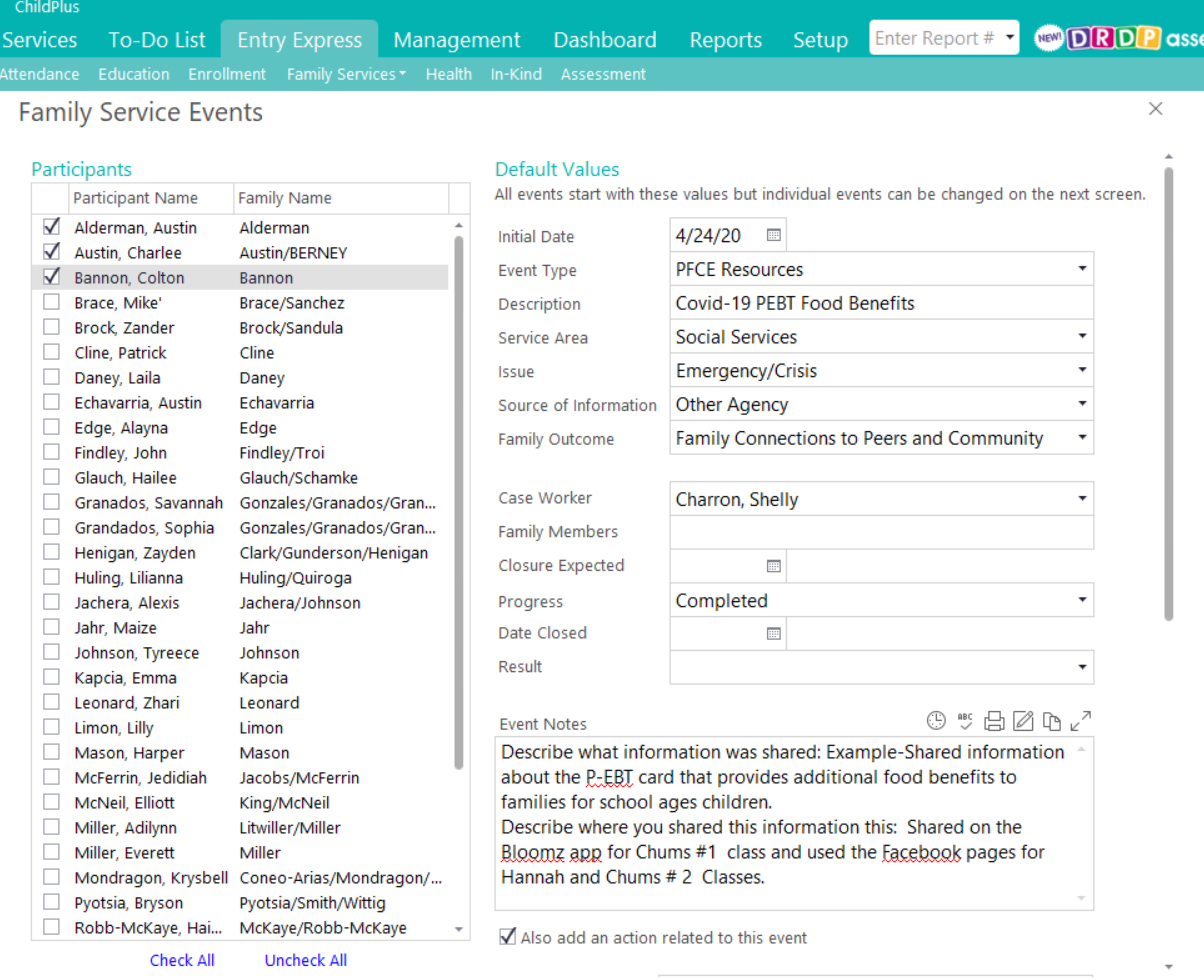
**Service Area:**  Select appropriate service area

**Issue:** Select appropriate issue

**Source of Information:** Select source of information

**Family Outcome:**  Select Family Outcome

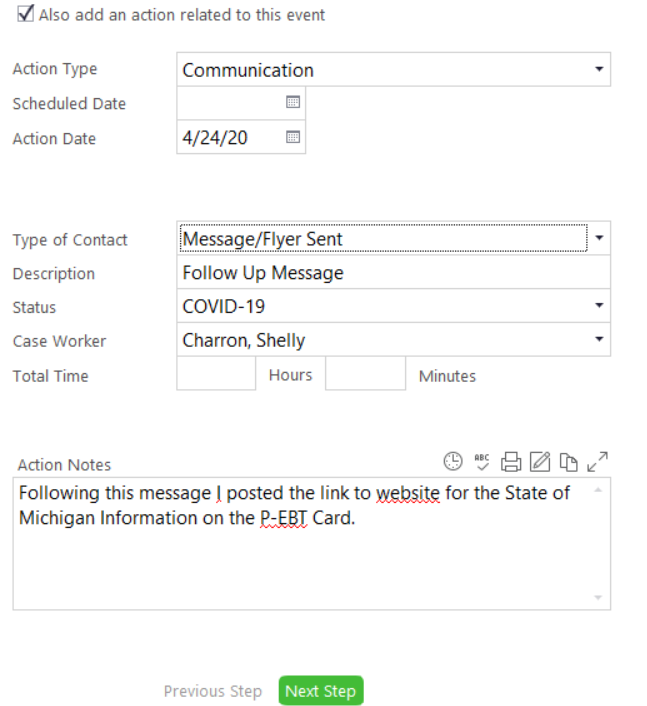
**Case Worker:** Select Case Worker

**

Participant

Names

***To Add and Action to this Event:***

Click box that says **Also Add an Action to this Event**

***Complete these fields****:*

**Action Type:** Choose action type

**Action Date**: Enter action date

**Type of Contact:** Choose type of communication

**Description**: Describe event

**Status:** Choose ***COVID-19*** as the status

**Case Worker:** Enter case worker who did this action

**Click on Next Step at the bottom of the screen**

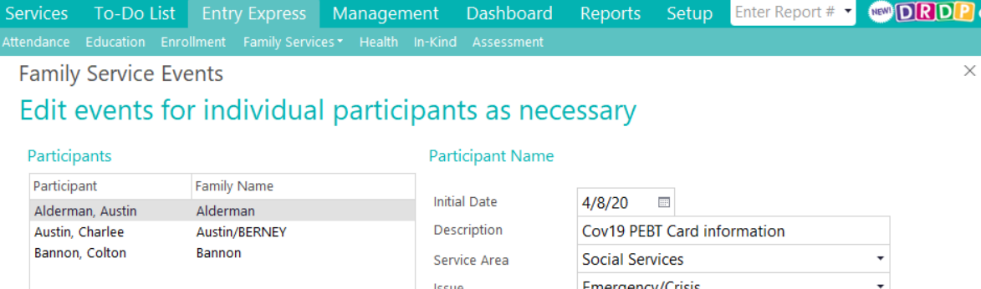
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***Edit Events for Individual Participants as Necessary***

At this point you can change information for individual participants if you wish to enter something different for a specific participant. You will need to highlight the participant on the list of participants you selected.

**To do this, click on the participant you want to edit, and they will show up as highlighted in gray.**

You can change the event information in the fields to the right. You can edit as many individuals as you wish to edit individually. If you choose to edit another participant after entering the details of the first participant, you will just need to click on and highlight the next participant you wish to edit details for. The fields will automatically be saved with the new data you entered.



**Click on Create Family Service Events at the bottom of the screen**

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