

# THEO – Tracking Home Visiting Effectiveness in Oregon

## MIECHV THEO Release Notes, 04/08/2020

### Recording MIECHV In-Person Visits and Telehealth Visits in THEO

There are two fields in THEO that record the type of Case Visit. In addition to recording Case Visits where the home visitor met in person with the client(s), you can also record Case Visits where the home visitor did not meet in person with the client(s). Use these fields to distinguish between in-person, face-to-face home visits versus telehealth visits by telephone or video conferencing methods.

Instructions about how to use the two visit method fields are below. Please contact THEO Application Support, [theo.support@state.or.us](mailto:theo.support@state.or.us), if you have any questions about how to use THEO.

1. Open the Care Plan for your client.
  - Hold your cursor over the **New (+)** icon in the upper right of the screen (Figure 1).
  - A drop-down menu opens. Click on “Case Visit” to add a visit to the client’s record.

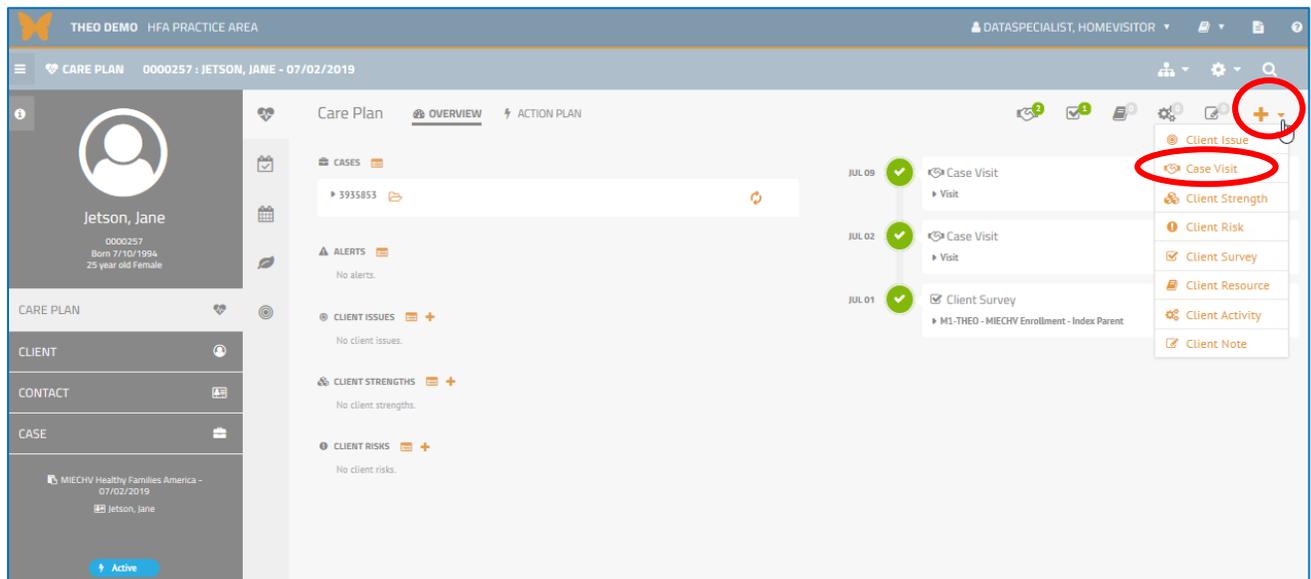


Figure 1 – Add a new Case Visit to the client’s Care Plan

2. A New Case Visit window opens (Figure 2). Enter data in the fields as usual. Click on the orange Save & Continue button.

The screenshot shows a 'New Case Visit' form with the following fields and values:

- REQUIRED FIELDS**
- Clients:** Two checked items: 'Jetson, Elroy' and 'Jetson, Jane'.
- Case:** Text input field containing '3935853'.
- Type:** Dropdown menu set to 'Visit'.
- Date:** Text input field with a calendar icon, placeholder 'MM/DD/YYYY'.
- Time (hh:mm):** Text input field.
- Duration:** Text input field with a dropdown arrow.
- HFA Practice Area:** Dropdown menu set to 'Dr. Specialist, HomeVisitor'.
- Buttons:** 'Save & Continue' (orange, circled in red) and 'Cancel' (grey).

Figure 2 – New Case Visit

3. The Case Visit Encounter survey opens automatically after the Case Visit saves and closes (Figure 3). Two new fields appear at the top of the Case Visit Encounter survey that describe the visit method. Click on the blank box beneath "Visit Method".

The screenshot shows the 'Case Visit Encounter' survey with the following elements:

- Page 1** (1 of 1)
- Visit Method:** A dropdown menu highlighted by a red box and a red arrow.
- If Other, please specify:** A text input field highlighted by a red box.
- Question:** 'Did the home visitor ask the parent if they had any concerns regarding their child's development, behavior or learning?' with radio buttons for 'Yes, the question was asked' and 'No, the question was not asked'.
- Buttons:** 'Save & Continue' (orange) and 'Cancel' (grey).

Figure 3 – Case Visit Encounter survey

4. A drop-down list of visit methods opens. Follow instructions in Part a or Part b (below), depending on the visit method.

The screenshot shows a web form titled "Case Visit Encounter" with a page indicator "Page 1" and "1 of 1". The "Visit Method:" label is followed by an open dropdown menu. The menu items are "In-person", "Telephone", "Video Conference", and "Other". Below the dropdown is a question: "Did the home visitor ask the parent if they had any concerns regarding their child's development, behavior or learning?" with two radio button options: "Yes, the question was asked" and "No, the question was not asked". At the bottom, there are two buttons: "Save & Continue" (orange) and "Cancel" (grey). A red arrow points to the dropdown menu.

Figure 4 – List of visit methods

- a. Real-time, two-way communication with the client (Figure 5):
- Select "In-person", "Telephone", or "Video Conference" from the list of visit methods if the home visitor and the client(s) were present in one place or had a telephone call or video conference together.
  - Skip the second question ("If Other, please specify").
  - Answer the question about whether the home visitor asked the parent if they had any concerns about their child.
  - Click on the orange Save & Continue button.

The screenshot shows the same "Case Visit Encounter" form. The "Visit Method:" dropdown menu is now closed and displays "Video Conference". Below it is a text input field labeled "If Other, please specify:". The question "Did the home visitor ask the parent if they had any concerns regarding their child's development, behavior or learning?" now has the "Yes, the question was asked" radio button selected. The "Save & Continue" button is circled in orange, and a red arrow points to it.

Figure 5 – In-person, telephone, and video conference visit methods

- b. "Other" visit method (Figure 6):
- Select "Other" from the list of visit methods if the home visitor and client(s) had two-way communication using email or text messaging.
  - Briefly describe your visit method in the second question, "If Other, please specify".
  - Answer the question about whether the home visitor asked the parent if they had any concerns about their child.
  - Click on the orange Save & Continue button.

The screenshot shows a web form titled "Case Visit Encounter" (Page 1 of 1). The "Visit Method" dropdown menu is set to "Other". Below it, a text box labeled "If Other, please specify:" contains the word "Email". A question asks, "Did the home visitor ask the parent if they had any concerns regarding their child's development, behavior or learning?" with two radio button options: "Yes, the question was asked" (which is selected) and "No, the question was not asked". At the bottom of the form, there are two buttons: an orange "Save & Continue" button with a right-pointing arrow, and a grey "Cancel" button. A red arrow points from the "Save & Continue" button up towards the "If Other, please specify:" text box.

Figure 6 – "Other" visit method (email or text messaging)

5. The Case Visit Encounter survey closes. The client's Care Plan Overview opens (Figure 7). The completed Case Visit appears in the Care Plan Timeline on the right side of your screen.

The screenshot displays the "Care Plan Overview" for a client named Jane Jetson. On the left, there is a sidebar with the client's profile information, including her name, ID number (0000257), birth date (7/10/1994), and age (25 years old Female). The main area is divided into sections for "CASES", "ALERTS", "CLIENT ISSUES", "CLIENT STRENGTHS", and "CLIENT RISKS", all of which currently show "No alerts" or "No client issues/strengths/risks". On the right side, there is a "Timeline" section showing a list of completed visits. A red box highlights the top entry in the timeline, which is a "Case Visit" on APR 07, with a "Visit Compl..." status and a date of 04/07/2020. A red arrow points from this entry towards the center of the screen.

Date	Event	Status	Date
APR 07	Case Visit	Visit Compl...	04/07/2020
AUG 03	Case Visit	Visit Compl...	08/03/2019
JUL 09	Case Visit	Visit Compl...	07/09/2019
JUL 02	Case Visit	Visit Compl...	07/02/2019
JUL 01	Client Survey	Complete	07/01/2019

Figure 7 – Completed Case Visit in the Care Plan Timeline