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, 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.

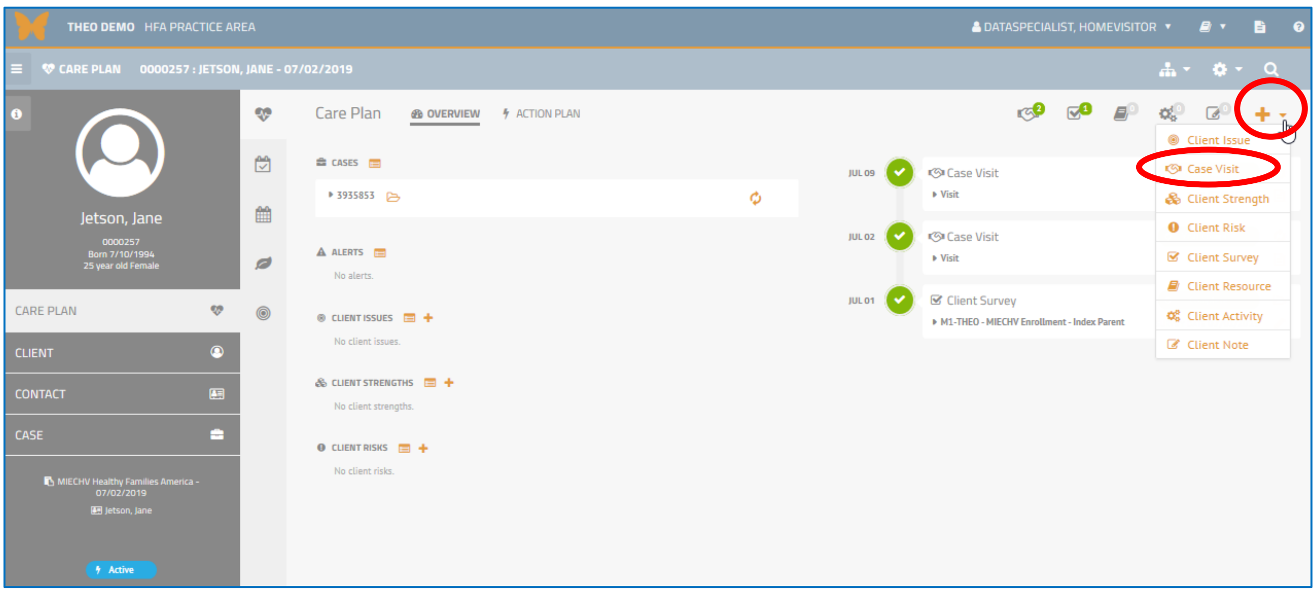

Figure 1 – Add a new Case Visit to the client’s Care Plan

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

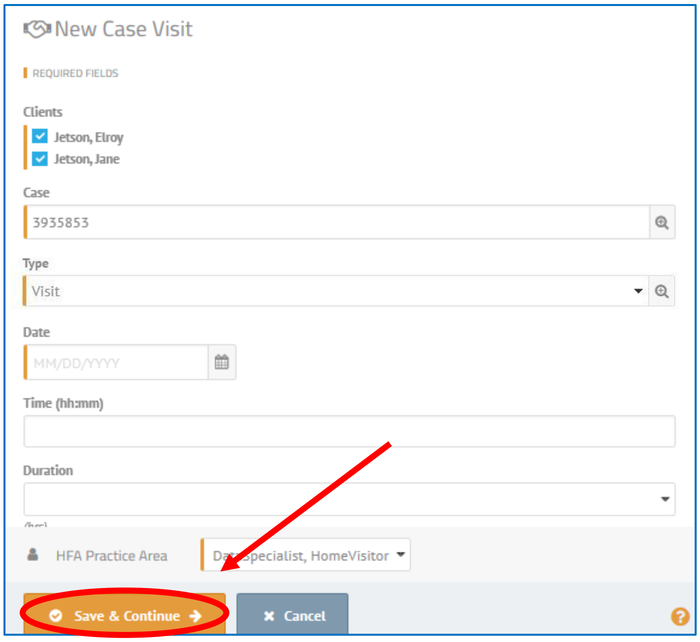

Figure 2 – New Case Visit

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".

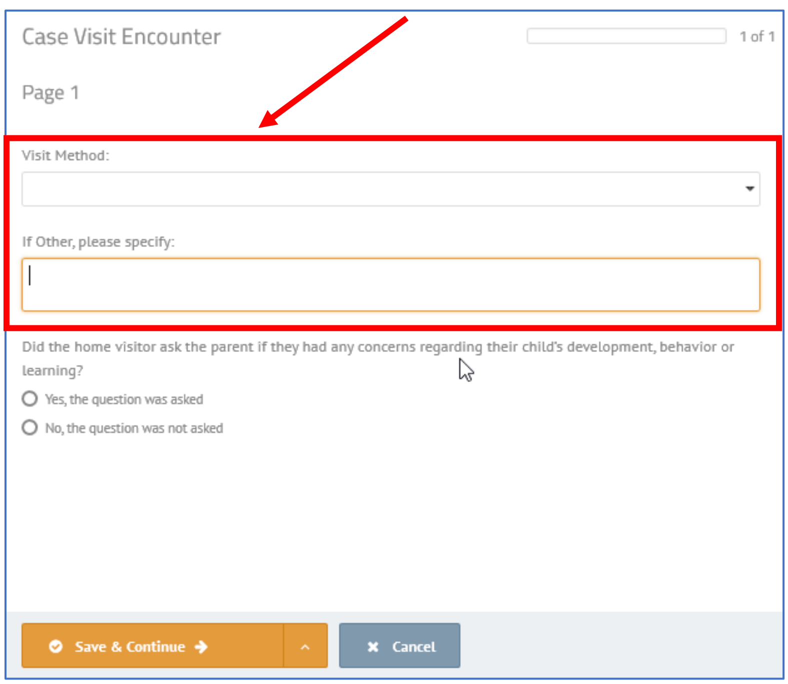

Figure 3 – Case Visit Encounter survey

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

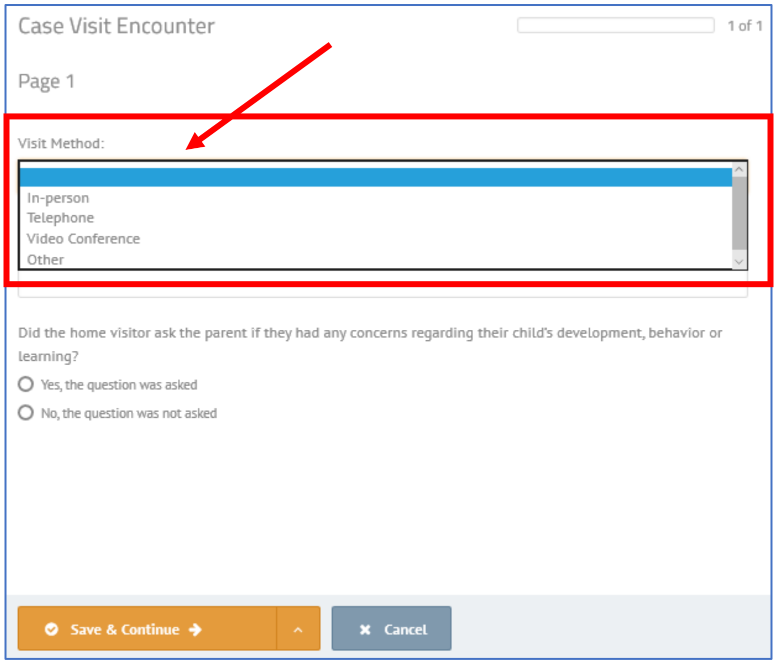

Figure 4 – List of visit methods

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.

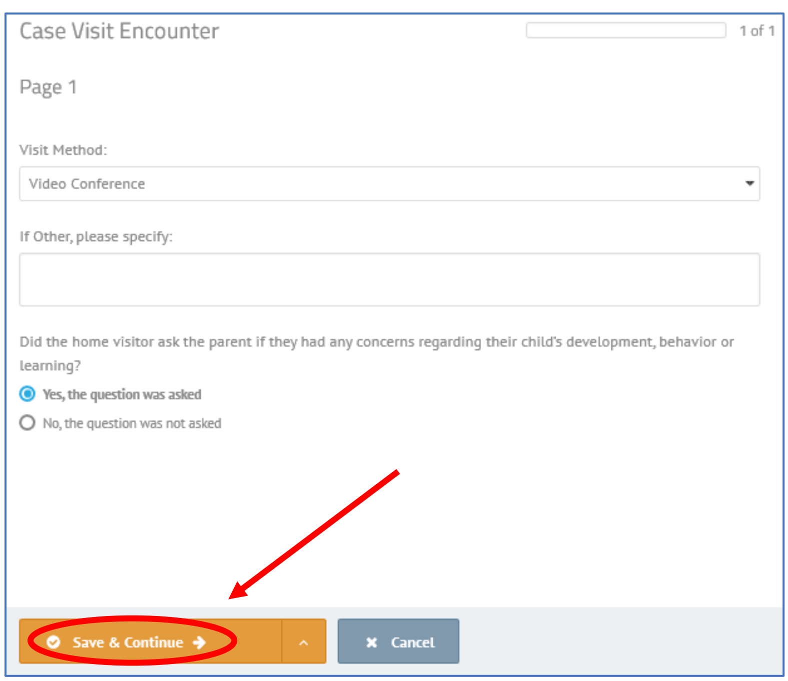

Figure 5 – In-person, telephone, and video conference visit methods

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.

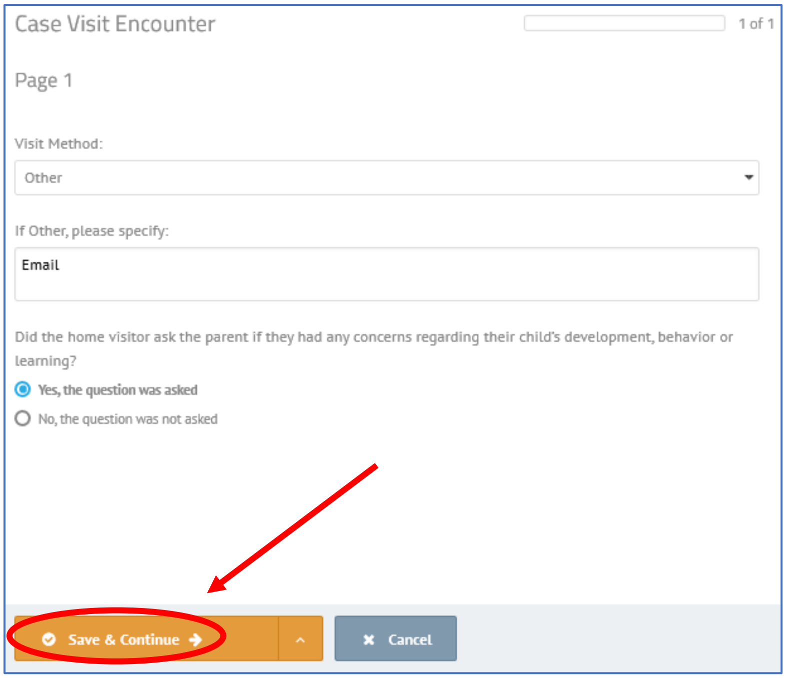

Figure 6 – “Other” visit method (email or text messaging)

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.

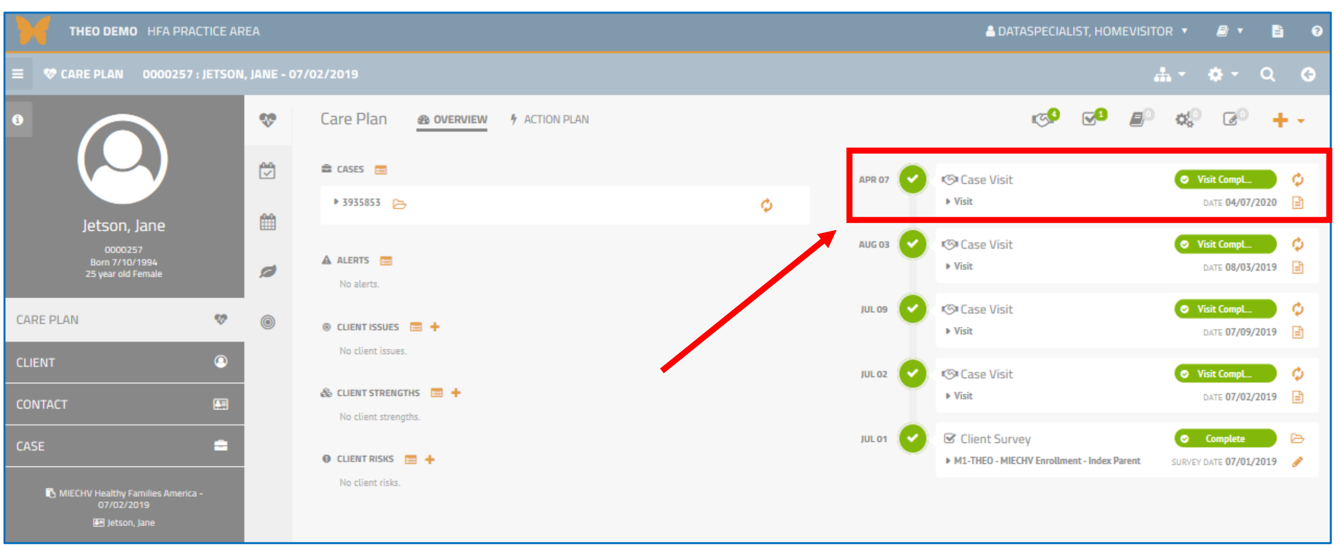

Figure 7 – Completed Case Visit in the Care Plan Timeline