

Oregon MIECHV Program Data Collection and Entry for Working Remotely: Guidance and Resources

Purpose

To provide guidance and resources on MIECHV data collection and entry for local implementing agencies (LIAs) when home visitors are working remotely.

General Data Collection and Entry Guidance

Ensure that your remote home visiting data collection procedures protect each client's right to confidentiality. Additionally, they should be compliant with privacy and security standards approved by your organization. This includes data collection and storage security on computers, the internet as well as hard copies. Follow your agency and model guidance around data collection (e.g., enrolling clients; completing IPV, PHQ-9 and ASQ-3 assessments remotely).

Data entry into THEO is required within 2 weeks (14 days) of the (remote) home visit to the best of your ability.

Use the updated client [schedule](#) to track timely completion of data collection forms, assessments and entry into THEO.

Secure Email

Regular email is not secure or HIPAA compliant and should not be used to communicate confidential client information such as names, identification numbers or other identifiable information. When you need to communicate regarding a client with the MIECHV team or THEO Applications Support it must be transmitted through secure or encrypted email. If you do not have the ability to generate a secure email through your program, please request a secure email from the MIECHV team or THEO Application Support, theo.support@state.or.us.

THEO Updates to Capture Remote Home Visits

Below are instructions for how to capture remote home 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 home visits versus remote/telehealth visits by telephone or video conferencing methods.

Note: Data entry staff should follow their model guidance for what counts as a remote home visit – if it counts as a visit for your model then it should be documented in THEO. For instance, if a text message (or a series of text messages) counts as a home visit for your model/program and you are documenting it for your program's data collection, you should also document it as a remote visit in THEO.

If a remote visit uses more than one method or you are unsure what to select, please select "Other" from the drop-down and write in a brief description. For example:

- "Visit started on IVC and switch to phone when internet connection was lost and could not be re-established."
- "Visit conducted across three shorter sessions to accommodate family. Two phone, one video to conduct screening."

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.

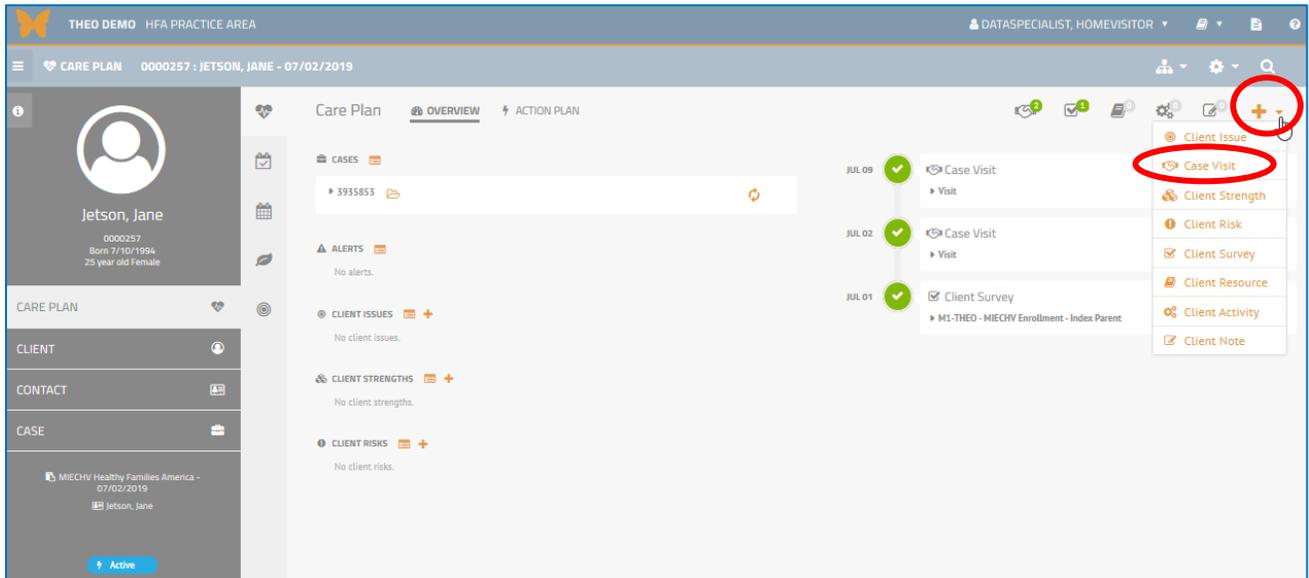


Figure 1 – Add a new Case Visit to the client’s Care Plan

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

The screenshot shows the 'New Case Visit' form. It has a title 'New Case Visit' and a section for 'REQUIRED FIELDS'. Under 'Clients', there are two checked checkboxes: 'Jetson, Etroy' and 'Jetson, Jane'. Under 'Case', there is a text field containing '3935853'. Under 'Type', there is a dropdown menu set to 'Visit'. Under 'Date', there is a date picker field showing 'MM/DD/YYYY'. Under 'Time (hh:mm)', there is an empty text field. Under 'Duration', there is a dropdown menu. At the bottom, there is a section for 'HFA Practice Area' with a dropdown menu set to 'Data Specialist, HomeVisitor'. At the very bottom, there are two buttons: 'Save & Continue' (highlighted with a red circle) and 'Cancel'. A red arrow points from the right towards the 'Save & Continue' button.

Figure 2 – New Case Visit

- 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”.

Case Visit Encounter 1 of 1

Page 1

Visit Method:

If Other, please specify:

Did the home visitor ask the parent if they had any concerns regarding their child's development, behavior or learning?

Yes, the question was asked

No, the question was not asked

Save & Continue → Cancel

Figure 3 – Case Visit Encounter survey

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

Case Visit Encounter 1 of 1

Page 1

Visit Method:

In-person

Telephone

Video Conference

Other

Did the home visitor ask the parent if they had any concerns regarding their child's development, behavior or learning?

Yes, the question was asked

No, the question was not asked

Save & Continue → Cancel

Figure 4 – List of visit methods

- a. In-person, phone, or interactive video conferencing (IVC) 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 a web form titled "Case Visit Encounter" with a "1 of 1" indicator. It is labeled "Page 1". The "Visit Method:" dropdown menu is set to "Video Conference". Below it is a text input field for "If Other, please specify:". A question asks, "Did the home visitor ask the parent if they had any concerns regarding their child's development, behavior or learning?". Two radio buttons are present: "Yes, the question was asked" (which is selected) and "No, the question was not asked". At the bottom, there is an orange "Save & Continue" button with a right-pointing arrow, which is circled in red. A red arrow points from the top right towards the "Save & Continue" button. To its right is a grey "Cancel" button.

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

- b. “Other” visit method (Figure 6):
 - i. Select “Other” from the list of visit methods if the home visitor and client(s) had two-way communication using email or text messaging, or if a remote visit used more than one method, or you are unsure what to select.
 - ii. Briefly describe your visit method in the second question, “If Other, please specify”.
 1. Examples for more than one method:
 - a. “Visit started on IVC and switched to phone when internet connection was lost and could not be re-established.”
 - b. “Visit conducted across three shorter sessions to accommodate family: two phone, one video to conduct screening.”
 - iii. 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.

Case Visit Encounter 1 of 1

Page 1

Visit Method:

If Other, please specify:

Did the home visitor ask the parent if they had any concerns regarding their child's development, behavior or learning?

Yes, the question was asked
 No, the question was not asked

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

- 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.

THEO DEMO HFA PRACTICE AREA DATASPECIALIST, HOMEVISITOR

CARE PLAN 0000257 : JETSON, JANE - 07/02/2019

Client: **Jetson, Jane**
 0000257
 Born 7/10/1994
 25 year old Female

CARE PLAN OVERVIEW ACTION PLAN

CASES
 3935853

ALERTS
 No alerts.

CLIENT ISSUES
 No client issues.

CLIENT STRENGTHS
 No client strengths.

CLIENT RISKS
 No client risks.

Date	Event	Status	Details
APR 07	Case Visit ▶ Visit	Visit Compl...	DATE 04/07/2020
AUG 03	Case Visit ▶ Visit	Visit Compl...	DATE 08/03/2019
JUL 09	Case Visit ▶ Visit	Visit Compl...	DATE 07/09/2019
JUL 02	Case Visit ▶ Visit	Visit Compl...	DATE 07/02/2019
JUL 01	Client Survey ▶ M1-THEO - MIECHV Enrollment - Index Parent	Complete	SURVEY DATE 07/01/2019

Figure 7 – Completed Case Visit in the Care Plan Timeline