

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.

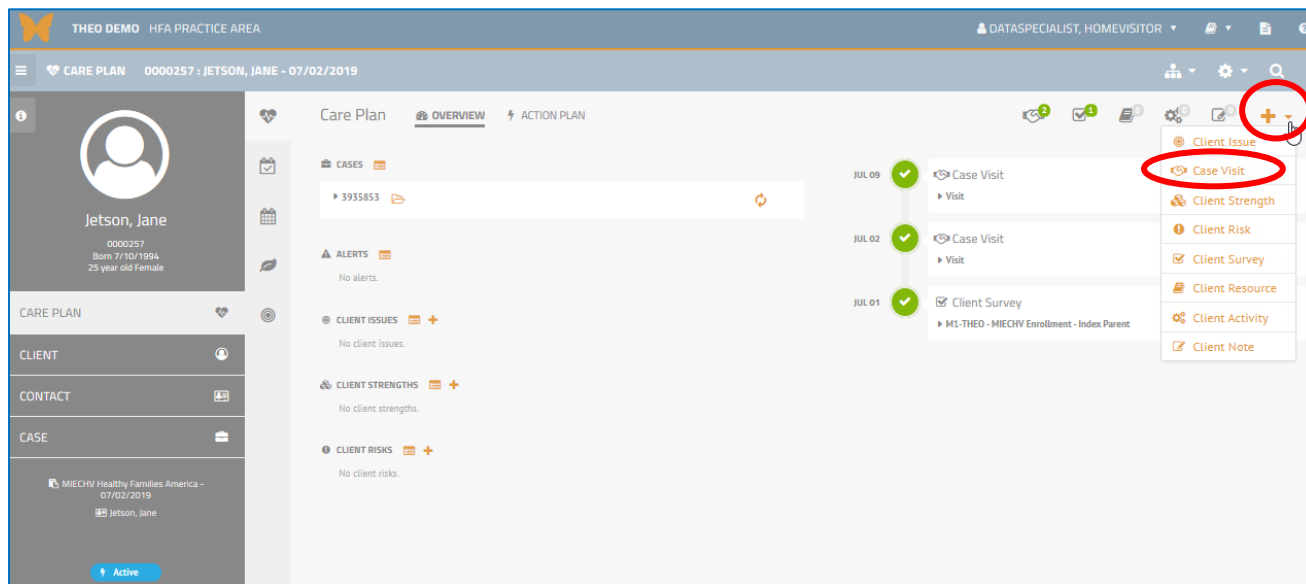


Figure 1 – Add a new Case Visit to the client’s Care Plan

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 sections for 'REQUIRED FIELDS' and 'Clients'. Under 'Clients', 'Jetson, Elroy' and 'Jetson, Jane' are checked. The 'Case' field contains '3935853'. The 'Type' field is set to 'Visit'. The 'Date' field is empty with a placeholder 'MM/DD/YYYY'. The 'Time (hh:mm)' field is empty. The 'Duration' field is empty. At the bottom, there's a dropdown for 'HFA Practice Area' set to 'Data Specialist, HomeVisitor'. The 'Save & Continue' button is circled in red, and a red arrow points to it. There is also a 'Cancel' 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”.

Case Visit Encounter 1 of 1

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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

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

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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.

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Visit Method:
Video Conference

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 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.

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Visit Method:
Other

If Other, please specify:
Email

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 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

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

DATA SPECIALIST, HOMEVISITOR

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

CARE PLAN

CLIENT

CONTACT

CASE

MIECHV Healthy Families America - 07/02/2019
Jetson, Jane

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.

APR 07 ✓ Case Visit Visit Compl... DATE 04/07/2020

AUG 03 ✓ Case Visit Visit Compl... DATE 08/03/2019

JUL 09 ✓ Case Visit Visit Compl... DATE 07/09/2019

JUL 02 ✓ Case Visit Visit Compl... DATE 07/02/2019

JUL 01 ✓ Client Survey Complete SURVEY DATE 07/01/2019

Figure 7 – Completed Case Visit in the Care Plan Timeline