Preparing and Documenting a Home Visit

Prior to the home visit, you want to review:

Family Tab

- **Family Strengths Assessment and Scores** – If it has not yet been attached, review in file
- **Case notes** – Pay particular attention to Emergency Crisis, Need Identified, Case Conference and Family background.
- **Established Family Goal(s)** – follow up on Family Goals
- **Attendance** – if there are any attendance concerns, offer support and explain the benefits of regular group attendance. Create a family goal on attendance if necessary.

Health Tab

- **Review the Health Information** – is there any missing information you can gather (Medical or Dental provider’s name, Medical Insurance ID, etc.)?
- **Review Well Child and Dental Exams** – do you need to get an ROI, support the parent in getting an appointment, or remind parent of upcoming due date for WCE or dental?
- **Concerns** – is there monthly follow up you are responsible for (vision, hearing, etc.)?
- **Immunization Planning** – is the child up to date, do they need immunizations prior to exclusion (Check Alerts)?

Things you may want to take with you:

- Print out of child and/or family goals
- Home Practice Goal and Literacy Goal Calendars
- Forms the parent may need to sign (In-Kind for HV, parent permission, new emergency form, ROI-M, ROI-D, Specialist ROI)
- Resource information that might be helpful to the family
- Parent Education
- Any materials needed to support parent child activity

When you return from the Visit:

Education Tab

- Scroll down to Home Based Visit Documentation
- Select Home Visit Documentation (document a **very brief** summary including: date, parent child activity and literacy activity, school readiness domains, list handouts/resources given or covered, mark PIR services, plan for next visit with parent input, and any additional information)
Family Tab

- Update the scores for the Family Strength and Needs Assessment if needed
- Document any Goal Follow up or create a new goal
- Create a new home visit case note if needed
- Update any follow up on Needs Identified or Emergency/Crisis case notes/PIR

Health Tab

- If you completed any follow up or planning during your visit, document now