EHS Home Visit Documentation in Child Plus

1. *Add the Home Visit Event: Click on the Child/ Family Services/ Events/ Add Event (Green Button)/Home Visits*
   - **Initial Date:** Today's date or date of first visit (must be after July 1)
   - **Description:** EHS Home Visits 2026-2027
   - **Associated With:** Entire Family (default)
   - **Case Worker:** Make sure your name is listed here
   - **Progress:** Started

2. *Schedule Home Visits**
   - Click the **three dots** next to **Add Action** on lower right and choose Schedule Home Visits
   - Leave for a **For a Home-Based Program checked (default)**
   - Schedule a home visit the same day each week...
     - **Starting:** pick a date after July 1st or the date of first home visit for that family
     - **Continuing Until:** No later than 6/30/27
       (Tip: Schedule through Winter Break, then Jan-June)
     - **Agency Worker:** Your name
     - **Hours:** 1 | **Minutes:** 30 (or 2 hours for siblings or pregnant participant/child)
     - **Description:** Home Visit
     - **Start Counter At:** 1 (default)
   - **Click OK –** all visits now appear in **Actions.**

***Note: To be consistent, the expectation is for you to use the Schedule Home Visits option with formatting shown (ex. Home Visit 1, Home Visit 2)**

3. *Weekly Documentation: Go into your Home Visit 2026-2027 Event and*
   - Go into appropriate visit (under Actions)
     - Add **Action Date**
     - Select **Status**
       - Choices are: Action Complete, Family Cancelled, No Show or Staff Cancelled
       - If Family Cancelled/No Show – Add reason in Action Notes
       - Note: Staff cancelled visits must be made up

4. *Transitions are Documented as follows:*
   - Orientation/Transition into EHS - Type O/T after Home Visit number (ex. Home Visit 1 O/T) in description
   - Newborn visit (ex. Home Visit 5 Newborn Visit) in the description
   - Transition from PM to Baby (ex. Home Visit 8 Transition from PM to Baby) in the description
   - ***NEW*** 30-month transitions are documented in the Education Tab in CP – click on Green Add Event button, choose Transition Plan from dropdown, put in the event date & that Status is started. Document the 4 steps as they happen and when the plan is complete, change the status to Completed and put in the Closed Date. Use the notes box for any notes/comments you wish to make throughout the process.

5. *Lesson Plans in Action Notes*
   - Child: Type LP and press Enter
   - Prenatal/Postnatal: Type PP and press Enter

6. *EHS Attendance Plans are added in the Home Visit Event Notes*

7. *Final Reminders*
   - Close out visits at end of year or when a child drops from the program
   - Need help? Contact Steph to delete extra visits or renumber scheduled visits.