

## Model Guidance: Data Entry in Visit Tracker Following Migration

This document provides model guidance on data entry in Visit Tracker for currently enrolled families migrated from the Penelope data system. For resources and support on using Visit Tracker, click “Support” in the upper right corner of the Visit Tracker screen.

**Congratulations- the families you are currently working with are moving into Visit Tracker! When you first go into Visit Tracker and look around, you will see all the data that migrated over from Penelope. For the data that did not migrate, we recommend you do the following:**

<p><b>On the 1<sup>st</sup> day</b></p>	<p><b>Setup</b></p>	<p>Visit Tracker allows supervisors to turn certain fields on or off. For example, a supervisor can choose to display only the screening and assessment tools their affiliate uses. However, certain fields must be turned on for PAT affiliates. This has already been done for you. Please do not change the fields that have been set to “show” in the following setup pages: Demographic/ Health; Family/Child Data; Goals/Plans; Planning Guide &amp; Private Visit Record Setup &gt; Preferences: PG/PVR; Resource Connections; and Child Screening section (you can turn fields off under Screening Tools).</p> <p>Visit Tracker offers an integration with Dropbox for uploading documents associated with a family file, such as a signed consent for services. Your affiliate can choose to use a different platform. To enable the Dropbox integration, go to “Setup,” click on “File Upload” on the left navigation, and follow the instructions.</p>
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<p><b>In the next week</b></p>	<p><b>Funding source information</b></p>	<p>You will enter funding source information in two separate areas. 1) Go to the “Children” tab and select the child. Click on “Information Record” on the left navigation and add the appropriate funding source(s). 2) Go to the “Guardians” tab and select the primary guardian. Scroll down and click on “Add New Code” next to the “Site/Fund Code” heading and select from a list set up by your administrator.</p>
	<p><b>Personal Visits</b></p>	<p>Record visits that took place in the last week (since you stopped using Penelope) and continue to schedule, plan and record all visits moving forward. Go to the “Families” tab and select the family. Click “Contacts” on the left navigation. To add a new contact, click the plus button in the upper right corner. Select your contact type: to count as a personal visit, you must select “private visit”. Click on the date of visit to open and complete the planning guide (select if you are using a Foundational Plan or the Planning Guide). Click on “Private” to open and complete the Personal Visit Record.</p>

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<b>Within the next month</b>	<b><i>Consent for Services &amp; Releases of Information</i></b>	Upload the family’s consent for services and any signed releases of information, using the Dropbox integration or other platform your affiliate has chosen. If using the Dropbox integration, go to the “Families” tab and select the family. Click on “File Upload” in the left navigation and follow the instructions provided there. When it comes time to do the annual renewal of the consent (or sooner, if possible,) use the updated consent which refers to information being stored in Visit Tracker. You can find this in OLIVER on the PAT Data Support Workspace, by clicking on the “Visit Tracker Support Materials” page. <a href="https://ebiz.patnc.org/eBusiness/workspaces/penelope/visit-tracker-support-materials">https://ebiz.patnc.org/eBusiness/workspaces/penelope/visit-tracker-support-materials</a>
	<b><i>Prenatal/ Postpartum Information</i></b>	For anyone who is currently pregnant or gave birth within the last 8 weeks, fill in information that didn’t migrate over (except for prior prenatal care visit dates) and continue to enter new information as it becomes available. It is not necessary to put in dates of prenatal visits with a healthcare provider if already recorded in Penelope. Simply enter new prenatal care visit dates here as they occur. Go to the “Children” tab and select the child. Click on “Prenatal/Postpartum” on the left navigation.
	<b><i>Active Goals</i></b>	Add information for goals that are still in progress. Go to the “Families” tab and select the family. Select “Goals/Plans” on the left navigation and click on the pencil icon to edit the in-progress goals. Enter the goal statement, steps, resources/people and most recent progress note. Continue to add progress notes at least monthly. Goals can also be updated from the Personal Visit Record as you are documenting your personal visits.
	<b><i>Active Resource Connections</i></b>	Add information for resource connections still in progress. Go to the “Families” tab and select the family. Select “Resource Connection” on the left navigation. Enter the most recent progress note and continue to add progress notes at least monthly. Resource Connections can also be updated from the Personal Visit Record as you are documenting your personal visits.
	<b><i>Well-child visits</i></b>	Add well-child visits as they occur. Go to the “Children” tab and select the child. Select “Health Information” on the left navigation. Scroll down to “Child Medical Visits” and click “Add Item”.
	<b><i>Milestones information</i></b>	Begin tracking each child’s milestones. Go to the “Children” tab and select the child. Select “Milestones” on the left navigation and enter information into the applicable age range. Milestones can also be updated from the Personal Visit Record as you are documenting your personal visits.

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<p><b>As you have new information/ No later than the next annual review date*</b></p> <p>* Make sure to add the annual review dates for child, guardian and family information. These are found on the Family Home page.</p>	<p><b>Child Information</b></p>	<p>Go to the “Children” tab, select the child and complete fields that didn’t migrate on the “Child Data” page. Next, enter health and dental insurance information by selecting “Health Info” on the left navigation. Click on “Insurance History” and then “Add Item” to enter health insurance information. Click on “Dental Care/Coverage” and then “Add Item” to enter dental insurance information.</p>
	<p><b>Child Screenings and Child Health Review</b></p>	<p>Go to the “Children” tab and select the child. Select “Screenings” on the left navigation and click the + sign at the top right corner.</p> <ul style="list-style-type: none"> <li>○ If you use the ASQ3 &amp; ASQ SE, select “Developmental” for the ASQ3 and “Social-Emotional” for ASQ SE. Enter the data for each.</li> <li>○ Select “PAT Child Health Record” and complete.</li> </ul>
	<p><b>Guardian Information</b></p>	<p>You will enter guardian information in two areas. 1) Go to the “Guardians” tab, select the parent/guardian and complete fields that didn’t migrate on this page. 2) Go to the “Families” tab and select the family. Select “Demographic/Health” on the left navigation and scroll down to “Guardian Demographics”. Update existing information for each guardian as applicable and enter information into fields that did not migrate. Scroll down further to “Health Info,” update existing information for each guardian as applicable, and enter information into the fields that did not migrate</p>
	<p><b>Family information</b></p>	<p>Go to the “Families” tab and select the family. Select “Demographic/Health” on the left navigation, enter information into fields that did not migrate, and update/add to existing information.</p>