

## TUTORIAL - GROUP CONNECTIONS

The Group Connections Plan and Record has been updated to reflect the changes to PAT Requirements and HIPYUSA Reporting. As you go through this tutorial, you will see notes on how your program type will determine what inputs will be available to you.

### CREATING A GROUP CONNECTION

A Group Connection can be created from 2 places which are both located in the Calendar tab:

1. Click on the date to get directed to the page where you can "Add New" and select "Group Contact"
2. Group Connections page - The next image illustrates that you can go to the Group Connections page and click on "ADD NEW GROUP CONNECTION"

The screenshot shows a calendar interface for February 2018. The calendar is displayed in a grid format with days of the week as columns and dates as rows. A modal window is open for the date February 03, 2018. The modal contains a header with the date, a message stating "There are no contacts scheduled for this date.", and a "Cancel" button. A dropdown menu is open, showing options: "Private Contact", "Group Contact", "Screening", and "Staff Event". A red circle highlights the "3" in the calendar grid, and a red arrow points from this circle to the "Group Contact" option in the dropdown menu.

The screenshot shows the "Group Connections" page. The page has a navigation bar at the top with tabs: "Setup", "Guardians", "Children", "Home Visitor", "Calendar", "Reports", and "Support". On the left side, there is a sidebar with options: "Log Out", "Export iCal", and "Group Connections". The "Group Connections" option is circled in red. The main content area has a heading "Group Connections" and a blue button labeled "ADD NEW GROUP CONNECTION" which is also circled in red. Below the button, there is a date range selector with the text "Please select a date range to display:" and two date input fields: "07/01/2013" and "02/14/2018". At the bottom, there are two buttons: "Display Group Connections" and "Clear filter".

## ADD GROUP CONNECTION

Whichever way you chose to create a Group Connection, both will open the “Add Group Contact” window.

For PAT Affiliates, there will be 3 buttons at the bottom. “Continue Plan” will only show for PAT programs since there is more items to record in the Plan required by PAT National.

The screenshot shows the "Add Group Contact" form with the following fields and values:

- Contact Type: Group Connection
- Date: 02/03/2018
- Start Time: 1:00 PM
- End Time: 02:00 PM
- Duration: 60 minutes
- Title of Event: Group Connection Tutorial
- Location: Visit Tracker Web
- Presenter(s): David
- Format: Presentation
- Number of families expected: 100
- Targeted ages of children: Less than 12 months, 13 to
- Home Visitors: David Nevada, Ellen Vaughn, Home Visitor, Sal
- Notes: (empty)
- Recurring Event?  No  Yes

At the bottom of the form, three buttons are visible: "Create and close" (orange), "Continue Plan" (blue), and "Cancel" (grey). A red circle highlights these buttons, and a callout box provides the following text:

**“Create and close”** will display for all programs.  
**“Continue Plan”** will show for PAT programs.  
When clicking “Continue Plan”, the complete planning form required by PAT will open up.  
NOTE: PAT programs can also choose to “Create and close” and return to the rest of the plan later on.

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## ADDITIONAL PLANNING RECORD FOR PAT PROGRAMS

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Here is a view of what the rest of the Plan looks for PAT programs.

- Clicking “Continue Plan” while on the “Add Group Contact” page will automatically open up this portion of the form
- If “Create and close” is chosen, you will be able to access the complete plan from the Group Connections page as you will see further down.

Group Connections Plan

**Publicity**

**Incentives**

**Refreshments**

**Areas of emphasis**

**Intent: What will we focus on at this group connection?**

**Topics and key points of information from home visitor resources and other sources:**

**Prompts and questions for sharing observations, questions, or reactions:**

**Learning Activities**

**Facilitation strategies (note additional staffing needs):**

**Materials and supplies:**

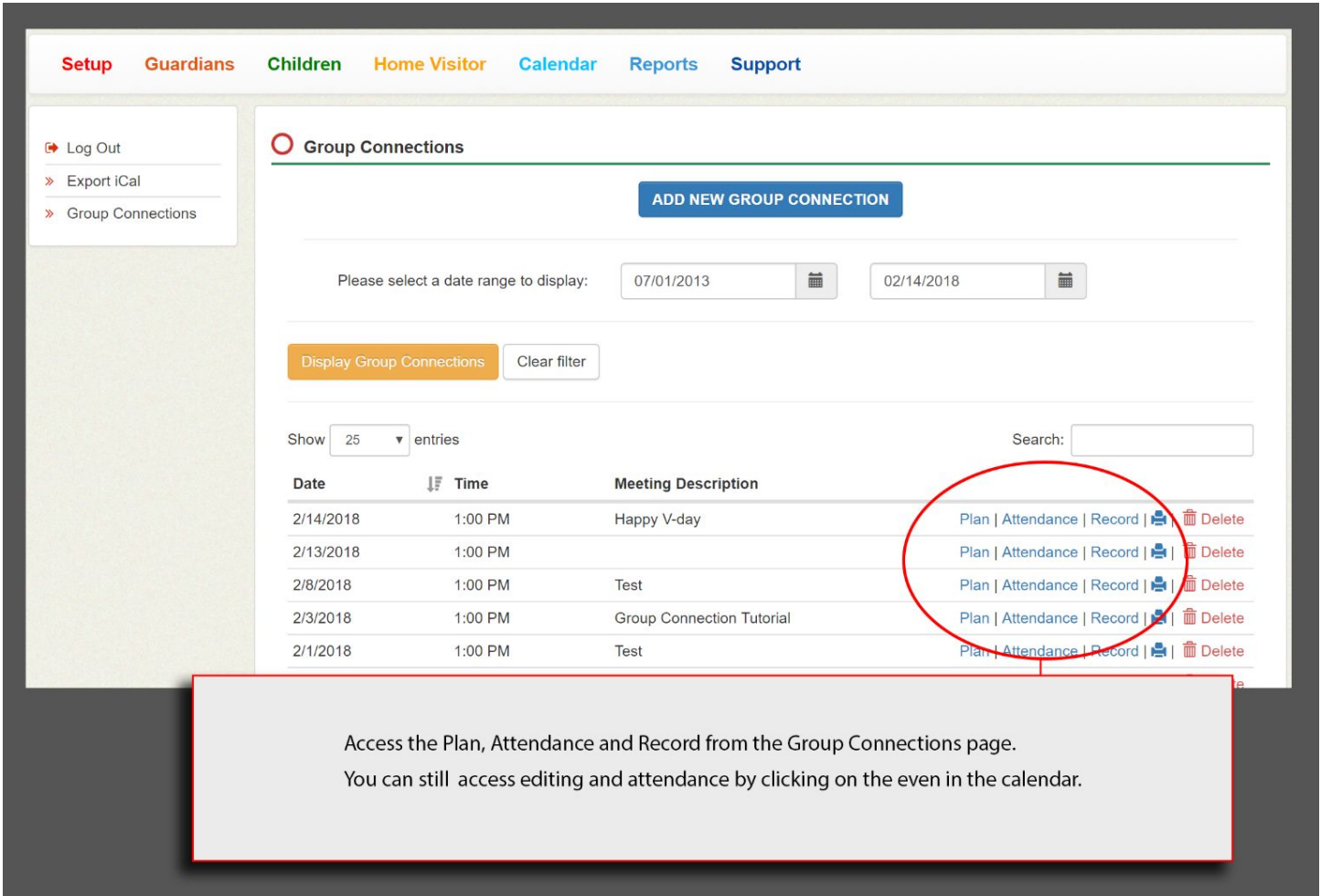
**Number of volunteers in group:**

**Volunteer names:**

## EDIT THE PLAN, RECORD ATTENDANCE, COMPLETE THE RECORD AFTER THE EVENT

From the Group Connections page, you can:

1. Edit the Plan (*this can also be accessed by clicking on the event name in the calendar*)
2. Take Attendance (*this can also be accessed by clicking on the event name in the calendar*)
3. Complete the Record
4. Print the complete Group Connection - Plan, Record and Attendance



The screenshot shows the 'Group Connections' page with a navigation menu at the top (Setup, Guardians, Children, Home Visitor, Calendar, Reports, Support) and a sidebar on the left (Log Out, Export iCal, Group Connections). The main content area has a header 'Group Connections' and a button 'ADD NEW GROUP CONNECTION'. Below this is a date range selector with '07/01/2013' and '02/14/2018'. There are buttons for 'Display Group Connections' and 'Clear filter'. A table shows a list of events with columns for Date, Time, Meeting Description, and action links. The action links for the first three events are circled in red.

Date	Time	Meeting Description	Action Links
2/14/2018	1:00 PM	Happy V-day	Plan   Attendance   Record   Delete
2/13/2018	1:00 PM		Plan   Attendance   Record   Delete
2/8/2018	1:00 PM	Test	Plan   Attendance   Record   Delete
2/3/2018	1:00 PM	Group Connection Tutorial	Plan   Attendance   Record   Delete
2/1/2018	1:00 PM	Test	Plan   Attendance   Record   Delete

Access the Plan, Attendance and Record from the Group Connections page.  
You can still access editing and attendance by clicking on the even in the calendar.

## THE RECORD

When opening the Record, all programs **other than HIPPY** will have these fields available. (see the HIPPY Record further down)

\*PAT Programs will have these fields plus the additional fields on the next image

### Group Connections Record

Meeting Title:    Date: 1/20/2015    Start Time: 4:00 PM    End Time: 5:30 PM

Location:

Presenter(s):

Format:

Facilitator:

Home Visitor:

Number of enrolled families attended: 1    Number of enrolled children attended: 1

Total Physically Present     Total Fathers Present

Number of families expected: 0    Targeted age of children:

Was this meeting meant to pertain to children:  0-36 mos.? |  36 mos. & older?

Was this meeting a:  Parent/Child Activity or a  Parents Only Activity?

Enter the number of minutes spent on the following topics: (total should = total time)

Child Growth & Development	<input type="text" value="0"/>	Language-Literace Development	<input type="text" value="0"/>
Child Birth and Child Care	<input type="text" value="0"/>	Health and Safety	<input type="text" value="0"/>
Pre/Postnatal Care - Infants & Mothers	<input type="text" value="0"/>	Nutrition	<input type="text" value="0"/>
Prevention of Child Abuse/Violence	<input type="text" value="0"/>	Substance and Other Addiction	<input type="text" value="0"/>
Fam. Structure, Function, Mgmt.	<input type="text" value="0"/>	Discipline And Anger Management	<input type="text" value="0"/>
Family Relationships	<input type="text" value="0"/>	Other Social and Family Fun Activities	<input type="text" value="0"/>
Parenting Skill Development	<input type="text" value="0"/>		

Notes

Save Record

## Additional Record items for PAT Programs

Actual expenses:

Budget shortfall or surplus(please explain):

Opportunities for feedback from participants and presenters, including surveys(check all that apply):

PAT Group Connection feedback survey       Other survey       Informal       Focus Group

Items for follow-up:

Other program considerations:

Parent handouts(please list):

Successes and challenges:

Notes

Save Record

HIPPY Record - For HIPPY programs, the "topics covered" will those fields that are required to report for the HIPPYUSA quarterly report

## Group Connections Record

Meeting Title: testing gc by admin Date: 2/3/2018 Start Time: 1:00 PM End Time: 2:00 PM

Location: this location

Presenter(s): axel

Format: Presentation, Parent cafe.

Facilitator: Shanta Porter

Home Visitor: Abigail Ponce, Adriana Calles, Carmela Montealvo

Number of enrolled families attended: 14 Number of enrolled children attended: 4

Total Physically Present  Total Fathers Present

Number of families expected: 6 Targeted age of children: Prenatal, Less than 12 months, 13 to 24 months, 25 to 36 months, 37 to 48 months, 49 to 60 months, Enrolled in kindergarten.

Was this meeting meant to pertain to children:  0-36 mos.? |  36 mos. & older?

Was this meeting a:  Parent/Child Activity or a  Parents Only Activity?

### Select all the topics covered

- |   |  |
|---|--|
| <input checked="" type="checkbox"/> Academic/Creative Activities  | <input checked="" type="checkbox"/> Personal/Professional Goals                |
| <input checked="" type="checkbox"/> Community Services            | <input checked="" type="checkbox"/> Social/Emotional Development               |
| <input checked="" type="checkbox"/> Domestic Violence             | <input checked="" type="checkbox"/> Awards/Recognition                         |
| <input checked="" type="checkbox"/> Education/Schools             | <input checked="" type="checkbox"/> Banquet                                    |
| <input checked="" type="checkbox"/> Field Trip                    | <input checked="" type="checkbox"/> End of Year/Graduation                     |
| <input checked="" type="checkbox"/> Financial Literacy            | <input checked="" type="checkbox"/> Holiday                                    |
| <input type="checkbox"/> Health/Nutrition/Safety                  | <input checked="" type="checkbox"/> Picnic                                     |
| <input checked="" type="checkbox"/> HIPPY Orientation             | <input checked="" type="checkbox"/> Other Celebration Purpose                  |
| <input checked="" type="checkbox"/> Parenting/Positive Discipline | <input checked="" type="checkbox"/> Other - List Any Other Enrichment Topic(s) |

lista de topics

If Role Play was an activity at the Group Connections, users will need to be able to check which curriculums were role played at the Group Meeting:

- Year 1, Packet:
- Year 2, Packet:
- Year 3, Packet:
- Language Role Played:

### Notes

this notes are available for this group connection called testing gc by admin

Save Record

