

TUTORIAL: RECORDING A RESOURCE CONNECTION

THE RESOURCE CONNECTION PAGE

Record referrals from the Resource Connection page located in the Families section.

The top right has 3 buttons:

1. Add a new referral/connection
2. Print the connections for the family in either the table format as seen on the Resource Connections page or in the PAT Record format
3. View this tutorial

The page displays all recorded connections. The table allows to sort by column and edit or delete a record.

Setup **Families** Guardians Children Home Visitor Calendar Reports Support

Log Out
New Family
Send Email
Family Non-Actives
Guardian Non-Actives

Family Home
Demographics
Contacts
Guardians & Children
Household
Resource Connection
Goals/Plans
Assessments
Health Info
Transition Plan

Anderson (Anderson, Julie) Q

Resource Connection

This family was referred to the following community resources/services: (example: DFS, WIC, etc.)
(referrals as a result of a screening should be entered on the child's screening record).

Show 10 entries Search:

Family Resource Connections

Date	Connection Type	Connected To	Current Status	Status as of...	Latest Progress Note	Complete?
3/23/2018	Family Planning	Planned Parenthood	First discussed	3/23/2018		N
3/22/2018	Adult Education, ...	x	First discussed	3/22/2018		N

Showing 1 to 2 of 2 entries

Previous 1 Next

ADD A RESOURCE CONNECTION



Click on the new connection button at the top right of the page

- A pop-up will open allowing you to enter the Resource Connection information

A few notes when recording the connection

- Connection Date is the date first discussed.
- If the connection relates to an assessment conducted, indicate the date and tool used.
- At the choose when to complete a connection so that they no longer show on the PVR.

web-based Family Contact Management

Resource Connection

Connection Date This is the date first discussed.

Pertains to

Referral from assessment? No Yes

Referrals resulting from a child screening should be recorded on the child's screening record in the Child Screenings section.

Connection Type

Connected By

Connected To

Connection Reason

Comments



Connection is Progressing (will show on PVRs) Completed (will no longer show on PVR)

RECORDING A RESOURCE CONNECTION FROM THE PVR

Resource Connections on the Personal Visit Record (PVR)

- Add a new connection
- Record a progress note without opening the connection
- Edit the connection or record a new status.

Resource Connections
Were resource connections reviewed during this visit? Yes No


Current Family Resource Connections + Add				
Connection Type	Connected To	Current Status	Latest Progress Note	Progress
Family Planning	Planned Parenthood	First discussed		+ 
Adult Education, job training, college	x	First discussed		+ 

RECORDING A FOLLOW UP or PROGRESS NOTES TO A RESOURCE CONNECTION


To update a record, click on the edit pencil for that record.

- Edit the original entry
- Record a new status
- Add a progress note. Progress notes can also be recorded when entering a new status.

Resource Connection ✕

Connection Date  This is the date first discussed.

Pertains to

Referral from assessment? No Yes 

Referrals resulting from a child screening should be recorded on the child's screening record in the Child Screenings section.

Connection Type

Connected By

Connected To

Connection Reason

Comments

Connection is Progressing (will show on PVRs) Completed (will no longer show on PVR)

Show entries

Resource Connection - Status History

Follow Up Date	Is family receiving services?	As of ...	Progress Note
3/23/2018	First discussed	3/23/2018	

Showing 1 to 1 of 1 entries

Progress Notes