



City of San Antonio Head Start Program

Family and Community Support Services

2020-2021 CHILDPLUS DATA ENTRY GUIDE

ChildPlus
Software

Family and Community Support Services 2020-2021 ChildPlus Date Entry Guide

TABLE OF CONTENTS

GETTING STARTED IN CHILDPLUS

- 3 Logging in to ChildPlus
- 3 Searching for Participants in ChildPlus
- 5 Viewing Participants in ChildPlus
- 8 Assigning Participants in ChildPlus
- 12 Adding Attachments in ChildPlus
- 14 Scanning Documents in ChildPlus
- 14 Adding Events

FAMILY ASSISTANCE

- 45 Event: Need Identified
- 47 Event: Need Identified Referral (Add Action)
- 50 Event: Need Identified Follow Up
- 51 Event: Need Identified Close Out
- 52 Event: RFA Mental Health
- 53 Event: Child Development Associate (CDA)

FAMILY MEETING

- 15 Event: Family Meeting Home Visit
- 18 Module: Parent Handbook
- 24 Event: Family Assessment
(Beginning of Year- BOY)
- 28 Event: Family Assessment
(End of Year- EOY)
- 30 Event: Participation in Goal Setting
- 38 Event: Non Participation in Goal Setting
- 40 Event: Family Goal Setting Follow Up
- 42 Event: Participation in Family Goal
Setting Completion/Close Out
- 44 Event: Non Participation in the Family
Goal Completion/Close Out

COMMUNICATION

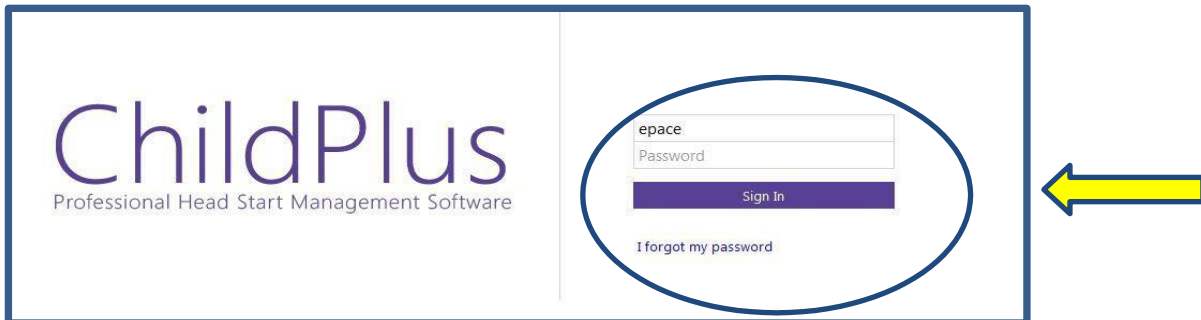
- 54 Event: Routine Contact
- 56 Module: Family Correspondence Tab
- 61 Event: Communication Log

OTHER

- 63 Using To-Do List to Track
Follow Up in ChildPlus
- 63 PIR Data Entry
- 66 Child Plus

Logging in to ChildPlus

Log in to Child Plus by entering your ChildPlus username and password.

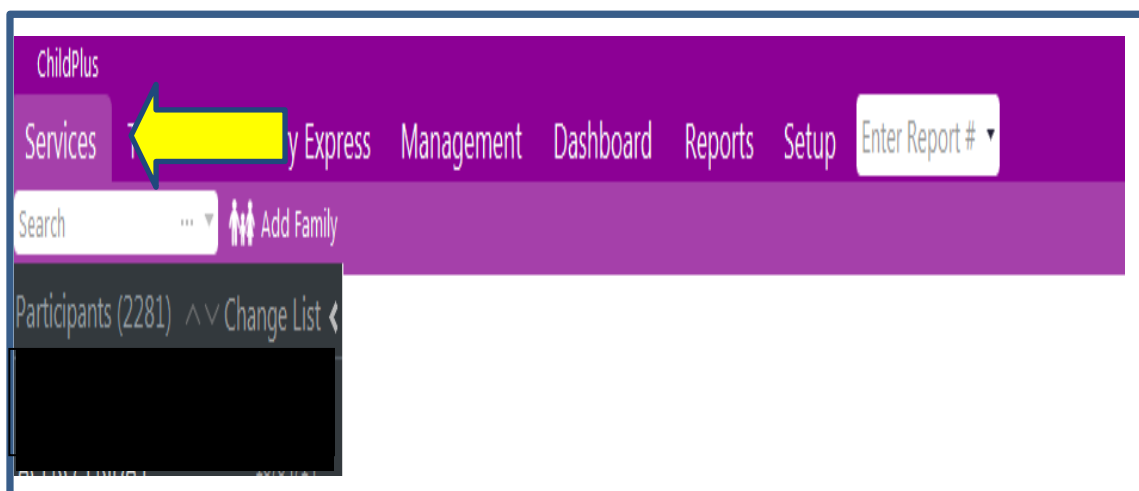
The image shows the ChildPlus login page. On the left is the ChildPlus logo with the tagline "Professional Head Start Management Software". On the right is a login form with a blue border. Inside the form, there are two input fields: "Username" and "Password". Below these fields is a blue "Sign In" button. At the bottom of the form is a link that says "I forgot my password". A yellow arrow points from the right side of the page towards the login form.

To reset your password, select "I forgot my password". You will receive an email with instructions to reset your password. If you are unable to reset your password, please contact your supervisor for assistance.

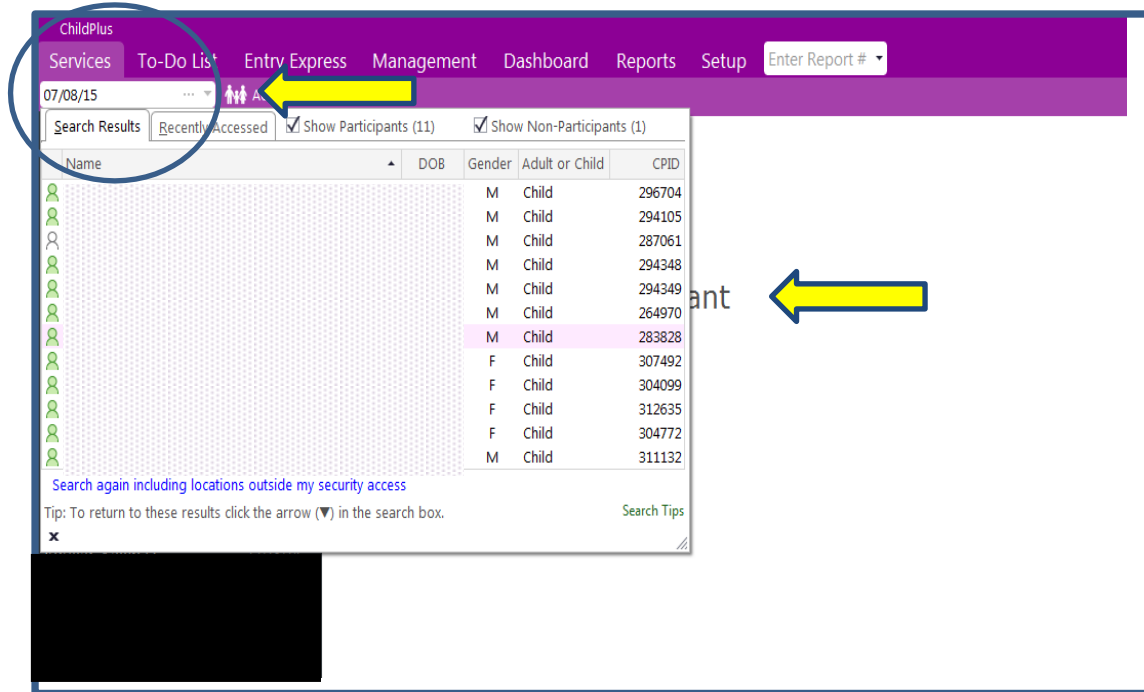
Searching for Participants in Child Plus

You can search for a child in the *Services* Tab using the Search field by entering one of the following identifiers:

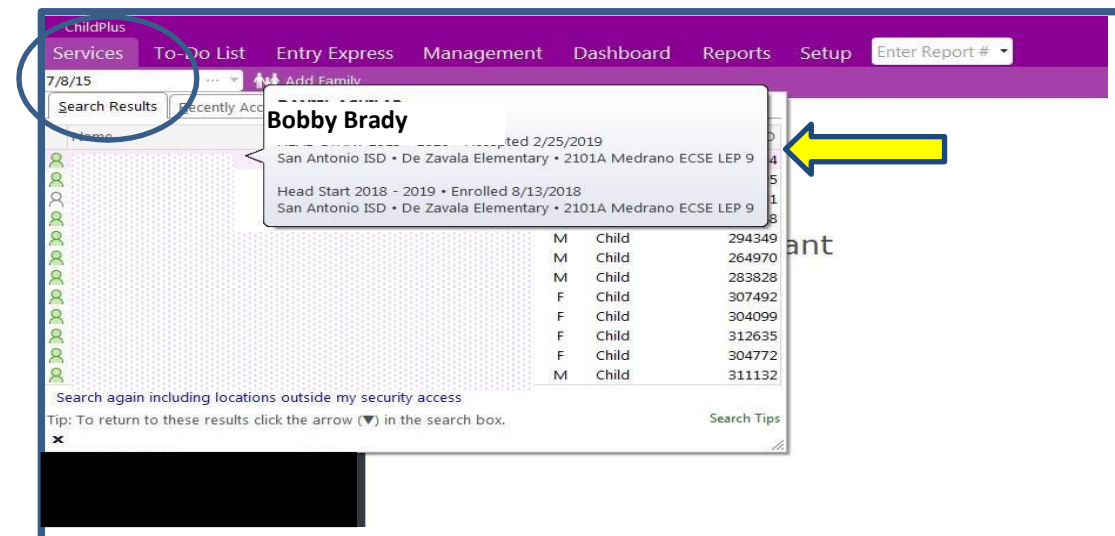
- Name of Child/Parent/Guardian
- Date of Birth of Child/Parent/Guardian
- Child Plus ID#
- Family Child Plus ID#

The image shows the ChildPlus interface with the "Services" tab selected. The "Services" tab is highlighted in purple. To its right are other tabs: "My Express", "Management", "Dashboard", "Reports", and "Setup". There is also a search box labeled "Enter Report #". Below the tabs is a search bar with the text "Search" and a dropdown arrow. To the right of the search bar is a button labeled "Add Family". Below the search bar is a dropdown menu showing "Participants (2281)" and a "Change List" button. A yellow arrow points from the right side of the page towards the "Services" tab.

- 1) Enter one of the identifiers into the search area.
- 2) Click Enter.
- 3) A list will generate with all participants with that identifier (in this case DOB)



- 4) You can place your mouse over each name and information will pop up listing Year of Program, Status of Child, Agency, School, and Classroom.



- 5) Once you have verified you have the correct child, click on their name and then the service area you would like to work in. You will primarily work in the *Application*, *Family Services* and *Health* Areas.

BOBBY BRADY
Male DOB: 11/01/11 3yr 11m CPID 259123
Accepted 2/25/19 • Year 2 (+1) HEAD START 2019 - 2020 • San Antonio ISD • De Zavala Elementary • 2101A Medrano ECSE LEP 9 • Head Start.1

Application Enrollment Family Services Health Immunizations Disability Transportation Education Attendance PIR

⬆ Select a Service Area

Best Practice: Make sure the information in ChildPlus matches the information of the child on your case load. There may be children with the same name and even at the same sites. Always double check to be sure!

Viewing Participants on your Caseload

- 1) Once logged into ChildPlus, select the *Services* Tab on the main screen.

ChildPlus

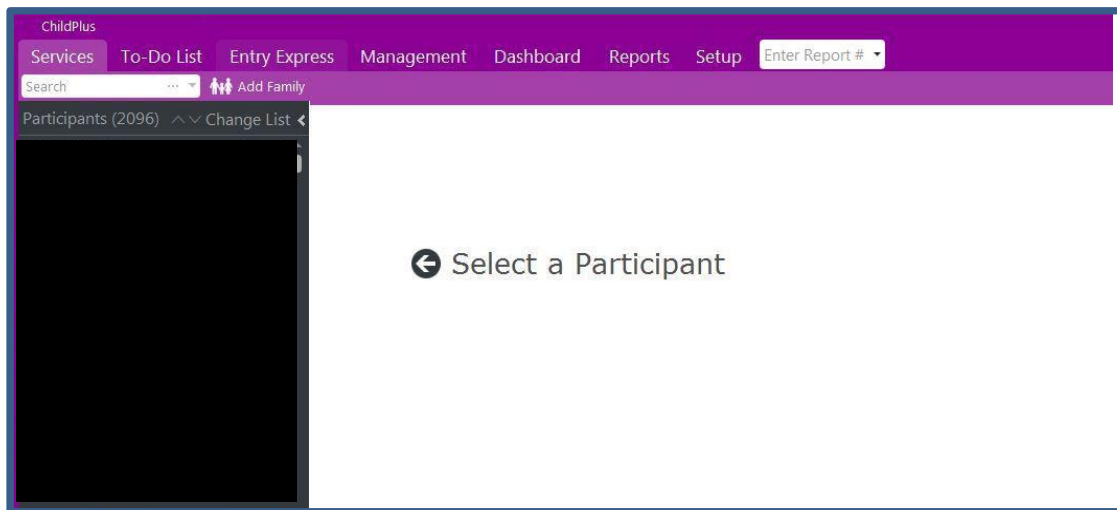
Services To-Do List Entry Express Management Dashboard Reports Setup Enter Report # ▾

Search Add Family

Participants (2096) ^ ▾ Change List ◀

⬅ Select a Participant

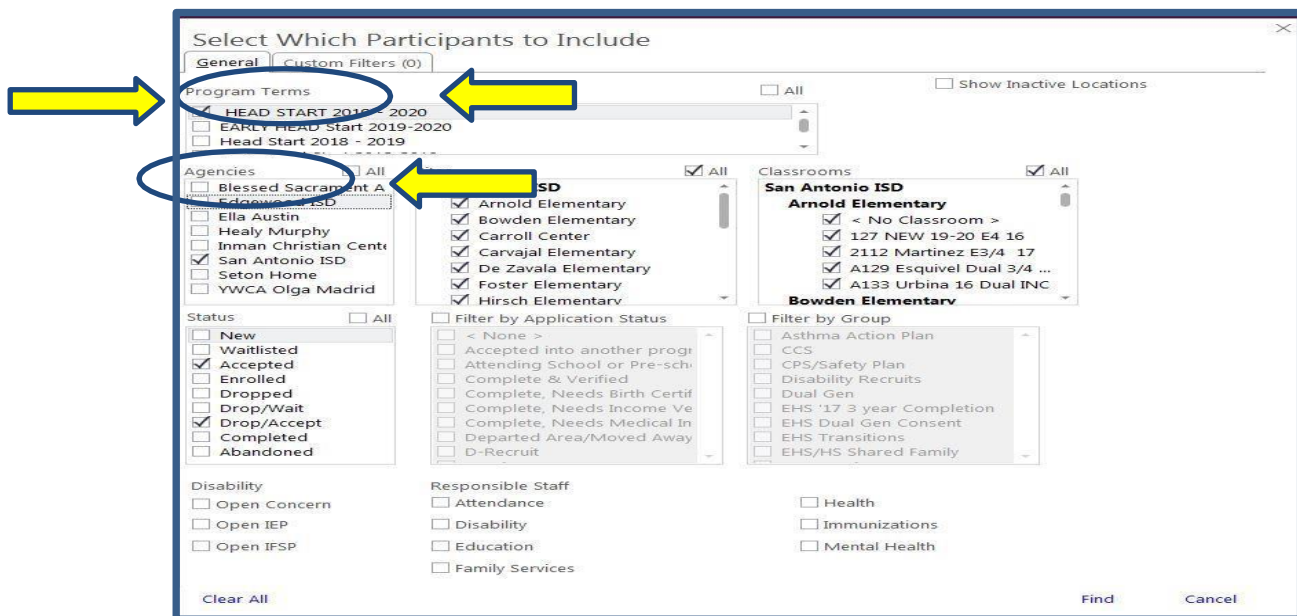
2) To customize the list of participants you see select Change list option.



3) The “Select Which Participants to include” window allows you to customize your list in the *General* Tab by

4) Program Terms: Current School Year (Head Start 2019-2020)

5) Agency: SAISD/EISD



- 6) Site: School where you are assigned (ex: Arnold)
- 7) Classroom: Teacher you are assigned to (ex: Martinez)

The screenshot shows the 'Select Which Participants to Include' dialog box. The 'General' tab is selected. The 'Program Terms' section has 'HEAD START 2019 - 2020' checked. The 'Agencies' section has 'San Antonio ISD' checked. The 'Status' section has 'Accepted' checked. The 'Sites' section has 'Arnold Elementary' checked. The 'Classrooms' section has '2112 Martinez E3/4 17' checked. A yellow arrow points to the 'Arnold Elementary' selection in the Sites list, and another yellow arrow points to the '2112 Martinez E3/4 17' selection in the Classrooms list.

- 8) Status: Status of Participant ex: accepted/ Drop Accept

Note: During summer months selecting "Accepted/Drop Accept" will list children that have been selected by ERSEA. Children are not enrolled until they attend at the beginning of the school year.

- 9) Press Find

The screenshot shows the 'Select Which Participants to Include' dialog box. The 'General' tab is selected. The 'Program Terms' section has 'HEAD START 2019 - 2020' checked. The 'Agencies' section has 'San Antonio ISD' checked. The 'Status' section has 'Accepted' checked. The 'Sites' section has 'Arnold Elementary' checked. The 'Classrooms' section has '2112 Martinez E3/4 17' checked. A yellow arrow points to the 'Find' button at the bottom right.

Your list will populate after selecting the desired selections. You can change your list to reflect one classroom at a time or entire caseload. When you open ChildPlus, the selected list will appear until you change it.

Assigning Participants to your Caseload

Once you are able to view your participant list:

- 1) Click the *Family Services* Tab
- 2) Click *Family Services Information* Tab

Enrolled 2/26/19 (100d) Year 1 (+1) Head Start 2018 - 2019 • Edgewood ISD • Cardenas Early Childhood Center • 17 KOYOC, L 17 3S • Head Start

Application Enrollment Family Services Health Transportation Education Attendance PIR

Events Family Outcomes Family Services Information Attachments BOY Wellness Assessment EOY Wellness Assessment

▼ Family Services Information

Case Worker: Perez, Antonia

Other Case Worker:

Other Case Number:

Staff Time Spent: 0 hours, 0 minutes

IFPA Agency Name: EISD

Primary IFPA Agency Type: Head Start

Case Worker Notes

Fill out the following entries for each child on your list.

- 3) Case Worker: Enter Your Name
- 4) IFPA Agency Name: District you are assigned to (SAISD/EISD)
- 5) Primary IFPA Agency: Head Start

Enrolled 2/26/19 (100d) Year 1 (+1) Head Start 2018 - 2019 • Edgewood ISD • Cardenas Early Childhood Center • 17 KOYOC, L 17 3S • Head Start

Application Enrollment Family Services Health Immunizations Disability Transportation Education Attendance PIR

Events Family Outcomes Family Services Information Attachments (21) BOY Wellness Assessment EOY Wellness Assessment

▼ Family Services Information

Case Worker: Perez, Antonia

Other Case Worker:

Other Case Number:

Staff Time Spent: 0 hours, 0 minutes

IFPA Agency Name: EISD

Primary IFPA Agency Type: Head Start

Case Worker Notes

Once you have filled out the entries in the *Family Services* Tab move to the *Health* Tab.

- 2) Click on the *Health* Tab
- 3) Click on the *Health Information* Tab

The screenshot shows the FCS ChildPlus Data Entry interface. The top navigation bar includes tabs: Application, Enrollment, Family Services, Health, Immunizations, Disability, Transportation, Education, Attendance, and PIR. The 'Health' tab is selected. Below this, there are sub-tabs: Health Information, Attachments (25), 18-19 EHS Child Health History, and 18-19 EHS Health Requirements Acknowledgement Form. The 'Health Information' sub-tab is active. The form contains fields for Agency Worker (Perez, Antonia), Doctor/Medical Home (*Dr. Maria Aguirre-Hernandez), and Dentist/Dental Home (*Dr. Carlen Palmer Blume). There are also fields for Critical Health Notes (N/A) and Allergy Problems (N/A). A large text area for Health Notes is at the bottom. Yellow arrows point to the 'Health' tab and the 'Health Information' sub-tab.

Fill out the following entries for each child on your list.

- 4) Agency Worker: Enter Your Name

The screenshot shows the FCS ChildPlus Data Entry interface, similar to the previous one. The 'Health' tab is selected, and the 'Health Information' sub-tab is active. The 'Agency Worker' field is highlighted with a blue circle, and a yellow arrow points to it. The other fields (Doctor/Medical Home, Dentist/Dental Home, Critical Health Notes, Allergy Problems, and Health Notes) are the same as in the previous screenshot.

- 5) Doctor/Medical Home: Use drop down to choose *Doctor/Medical Home*. This information can be found on the *Child Health History*.

The screenshot shows the 'Health Information' tab in the '18-19 EHS Child Health History' form. The 'Doctor/Medical Home' dropdown menu is open, showing a list of providers. A yellow arrow points to the 'Details' link next to the selected provider, '*South Texas Center for Ped C...'. The list includes various medical centers and clinics in San Antonio, TX, with their phone numbers and types (Doctor, Doctor/Dentist/Health Center, etc.).

- 6) Dentist/Dental Home: Use drop down to choose *Dentist/Dental Home*. This information can be found on the *Child Health History*.

The screenshot shows the 'Health Information' tab in the '18-19 EHS Child Health History' form. The 'Dentist/Dental Home' dropdown menu is open, showing a list of dental providers. A yellow arrow points to the 'Details' link next to the selected provider, '*Smile Center (WW White)'. The list includes various dental centers and clinics in San Antonio, TX, with their phone numbers and types (Dentist, Dentist/Dentist/Health Center, etc.).

Best Practice: Entering your name as FSW/ Caseworker and updating *Medical/Dental Home*. It does saves you time during the year to ensure each of your families assigned to you reflect your name. Take advantage of any opportunity that will make you more efficient later when managing your caseload.

- 7) PIR: *Primary Health and Dental Coverage At Enrollment*. This information can be found on the *Child Health History*.

The screenshot shows the PIR form with the following details:

- Health Information:**
 - Agency Worker: Cano, Diana
 - Doctor/Medical Home: *Dr. Sergio Ramon
 - Dentist/Dental Home: *Medico Medical Dental (WW...)
 - Health Notes: (Empty text area)
- PIR - HEAD START 2019 - 2020 (Accepted 6/6/19):**
 - Next Year: HEAD START 2019 - 2020
 - Accepted 6/6/19
 - San Antonio ISD • Nelson Center • *122 Martinez D4 20
- Primary Health Coverage PIR:**
 - At Enrollment: Medicaid
 - At End of Enrollment: Medicaid
- Dental Coverage:**
 - Dental Coverage: Medicaid
 - Dental Coverage Number: 12345678

Yellow arrows point to the 'Medicaid' selections in the Primary Health Coverage and Dental Coverage sections.

- 8) PIR: *“Did the child: At Enrollment”* This information can be found on the *Child Health History and Nutrition Assessment*.

The screenshot shows the PIR form with the following details:

- Primary Health Coverage PIR:**
 - At Enrollment: Medicaid
 - At End of Enrollment: Medicaid
- Dental Coverage:**
 - Dental Coverage: Medicaid
 - Dental Coverage Number: 12345678
- Health/Dental Coverage Notes:** (Empty text area)
- Did the child:**
 - At Enrollment: Yes
 - At End of Enrollment: Yes
- WIC PIR:**
 - WIC ID: (Empty field)
 - Note: WIC information can also be edited in Family Services
- Other Health Coverage:**
 - Insurance Number: (Empty field)

A yellow arrow points to the 'At Enrollment' dropdown menu in the 'Did the child:' section.

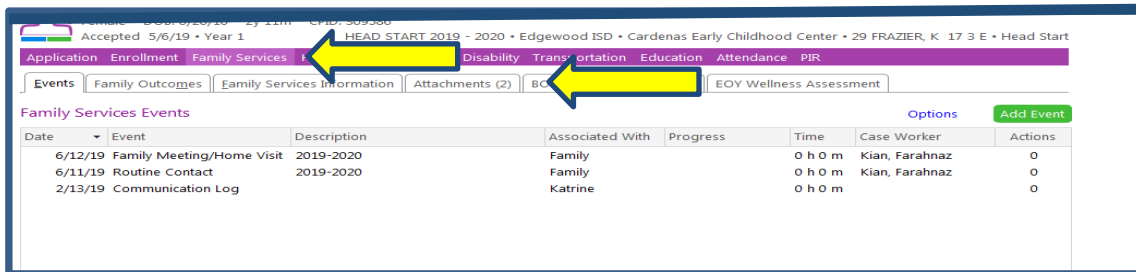
Best Practice: Although PIR has Benchmark Due Date Guide for data entry, it's best to stay current with PIR throughout the year. During the summer is an ideal time to work on “At Enrollment” PIR!

Adding Attachments

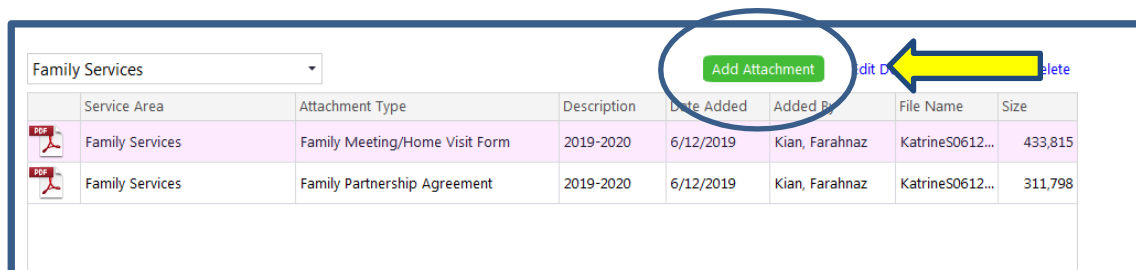
All supporting documentation will be scanned into ChildPlus using your scanner in the *Attachments* Tab in each service area.

When you need to attach a document in a service area you will click on the *Attachment* Tab within that service area. If you are in *Family Services* Tab and scan a *Health* document, it will not be attached correctly. You need to be in the service area you would like the attachment to show up in.

- 1) Click the *Attachment* button in the service area you are working in.



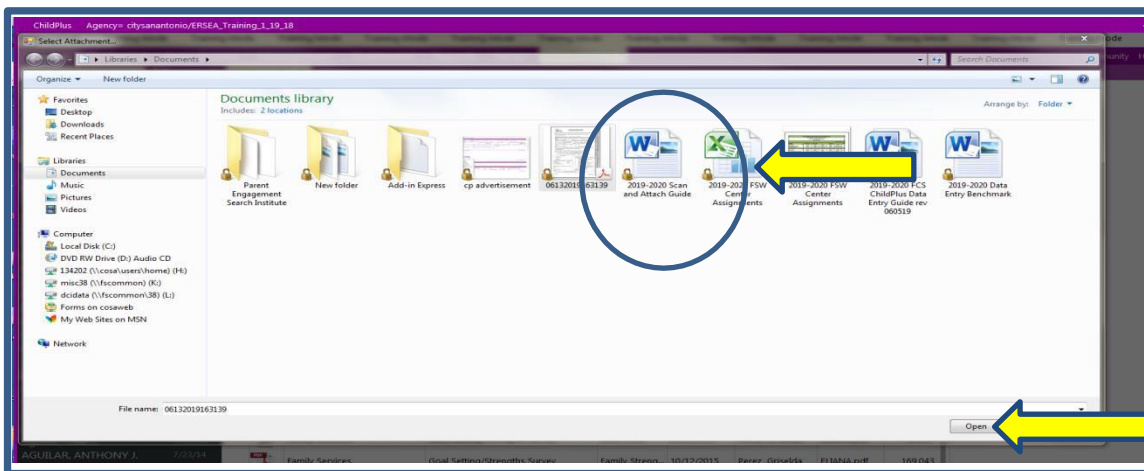
- 2) You will be taken to a listing of attachments you have for the service area. Once there you will click on Add Attachment.



Best Practice: It is always good to review documents that have already been scanned. You may be able to spot documents that may have been scanned into the wrong service area or have the wrong description. **Always follow your Scan and Attach Guide.** Reports are run by the Description that was selected. Even if you don't have the right format for the year it cannot capture some items.

If you find you entered a wrong description you should go back and fix it. If you have inherited a caseload that has a few entry mistakes, it is your responsibility to correct them. However, if you have many documents that were mislabeled, contact your supervisor for assistance. Do not email the previous FSW to fix the errors.

- 3) Your documents library will pop up and you will indicate your document scanned and press open.



- 4) Once your document has been identified you will follow the **Scan and Attach Guide** to identify your document in ChildPlus. Click Save. (This example *Family Meeting Home Visit* form)



2020-2021 Head Start Program Child Plus Scan Order and Process Guide

Application Documents

Source Document	Service Area	Attachment Type	Description
Application	Application	Signed Application	

Scanning Documents to attach in ChildPlus

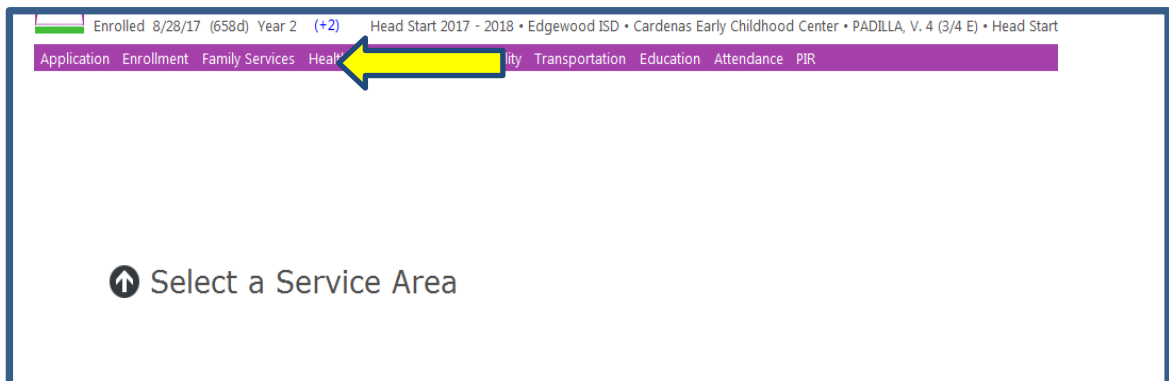
All supporting documentation is scanned into ChildPlus using your scanner in the *Attachments* Tab in each service area.

Best Practice: If pages are hard to read or are facing the opposite way, rescan documents. You can indicate to not scan blank pages, but it may happen if there are smudges or small pen marks. Clean up your entries by deleting these blank pages. Follow these best practices and your attachments will be clear and easy to read. Quality matters!

Adding Events

Events will be added as they occur. There are certain events that will be added by your supervisor using Entry Express.

- 1) Click on *Service Area* that you will be working in.

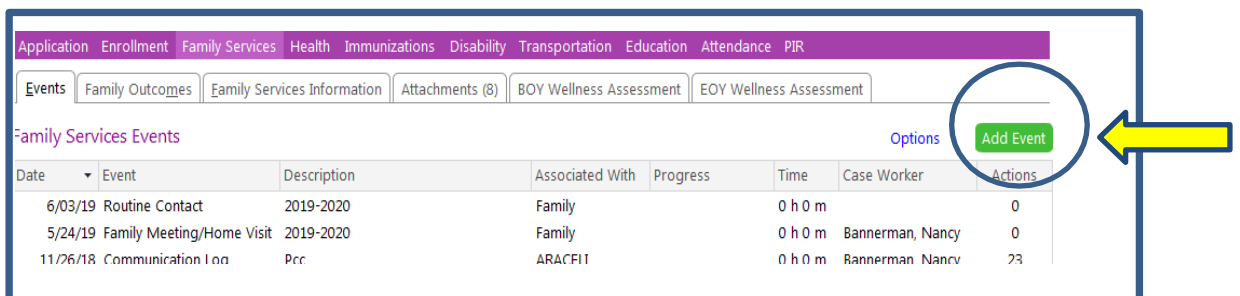


Enrolled 8/28/17 (658d) Year 2 (+2) Head Start 2017 - 2018 • Edgewood ISD • Cardenas Early Childhood Center • PADILLA, V. 4 (3/4 E) • Head Start

Application Enrollment Family Services Health **Immunizations** Disability Transportation Education Attendance PIR

↑ Select a Service Area

- 2) Once in the service area you will be adding an event for, click Add Event



Application Enrollment Family Services Health Immunizations Disability Transportation Education Attendance PIR

Events Family Outcomes Family Services Information Attachments (8) BOY Wellness Assessment EOY Wellness Assessment

Family Services Events Options **Add Event**

Date	Event	Description	Associated With	Progress	Time	Case Worker	Actions
6/03/19	Routine Contact	2019-2020	Family		0 h 0 m		0
5/24/19	Family Meeting/Home Visit	2019-2020	Family		0 h 0 m	Bannerman, Nancy	0
11/26/18	Communication Log	Prc	ARACFI		0 h 0 m	Bannerman, Nancy	23

- 3) A list of possible events will be displayed. Click on the one you would like to add. Use your ChildPlus Data entry guide to assist you in adding specific events in the *Family Services* Tab and *Health* Tab.

Enrolled 8/1/19 (286d) Year 1 (+2) Early Head Start 2019-2020 • Healy Murphy • Healy Murphy • 125-18m-24m Parr/Reye 7 • Early Head Start

Application Enrollment Family Services Health Immunizations Disability Transportation Education Attendance PIR

Events Family Outcomes Family Services Information Attachments (4) Family Correspondence Intensive Case Management

Family Services Events Options Add Event

Date	Event	Description	Associated With	Progress
5/12/20	Routine Contact	check in/ parent phone call	Family	
5/12/20	Need Identified	Financial assistance	Family	In Progress
5/11/20	Need Identified	Exceptional Kids Resource	Family	Completed
5/11/20	Need Identified	Home learning activities	Family	Completed
5/11/20	Need Identified	Ready rosie parent/child activities	Family	Completed
5/04/20	Need Identified	Home Learning Activities	Family	Completed
5/04/20	Routine Contact	check in/ parent check in	Family	
5/04/20	Need Identified	Ready Rosie Parent Child Activities	Family	Completed
4/28/20	Routine Contact	check in/ parent phone call	Family	
4/28/20	Need Identified	Essentials day	Family	Completed
4/28/20	Need Identified	Ready rosie parent/child activities	Family	Completed
4/28/20	Need Identified	Home learning activities	Family	Completed
4/22/20	Need Identified	Home learning activities	Family	Completed
4/21/20	Need Identified	Remote Learning	Family	Completed
4/21/20	Routine Contact	check in/ parent phone call	Family	

Add Family Service Event

- Attendance
- EHS-Child Care Services
- EHS-Transitions
- Family Goal
- Family Meeting/Home Visit
- Fatherhood Activity
- Home Visit
- Interest Identified
- Mental Wellness Services
- Need Identified
- RFA-Mental Health
- Routine Contact

Cancel

Event: Family Meeting/Home Visit

COVID will affect this event from previous processes. The procedure and data entry will remain the same with the exception of capturing the signature on the Family Meeting/Home Visit form. The information on the form will be reviewed with parents over the phone and signature will not be required during the 2020-2021 school year.

- 1) Add *Family Meeting/Home Visit* Event

Application Enrollment Family Services Health Immunizations Disability Transportation Education Attendance PIR

Events Family Outcomes Family Services Information Attachments (3) Family Correspondence Intensive Case Management Parent Handbook

Family Services Events Options Add Event

Date	Event	Description	Associated With	Progress
9/09/20	Need Identified	Utility Assistance	Family	In Progress
6/17/20	Family Meeting/Home Visit	2020-2021	Family	
1/13/20	RFA-Mental Health	2019-2020	Family	Complete
10/21/19	Need Identified	Food and Uniforms	Family	Complete
9/25/19	Family Goal	2019-2020	Family	Complete
9/07/19	Family Goal	2020-2021	Family	Complete
9/05/19	Need Identified	Utility Assistance	Family	In Progress
8/28/19	Family Meeting/Home Visit	2019-2020	Family	
8/28/19	Routine Contact	2019-2020	Family	
8/27/19	Routine Contact	2019-2020	Family	
6/17/19	Family Goal	2019-2020	Family	In Progress
5/09/19	Family Meeting/Home Visit	2019-2020	Family	
7/02/18	Attendance	Promoting Good Attendance	Family	Complete
6/13/18	Need Identified	SafeCare	Family	In Progress

Add Family Service Event

- Attendance
- EHS-Child Care Services
- EHS-Transitions
- Family Goal
- Family Meeting/Home Visit
- Fatherhood Activity
- Home Visit
- Interest Identified
- Mental Wellness Services
- Need Identified
- RFA-Mental Health
- Routine Contact

Cancel

- 2) Initial Date: Enter the date the actual event occurred
- 3) Description: Program Year(ex. 2020-2021)
- 4) Case Worker: Enter Your Name

Family Meeting/Home Visit

Initial Date: 6/17/20 [Schedule Home Visits](#)

Description: 2020-2021

Associated With: Entire Family

Case Worker: Pace, Elvia

- 5) Event Notes: If any needs were identified during the *Family Meeting/Home Visit*, add “Family expressed need for _____. Refer to Need Identified Event dated.” Modify the above statement to reflect the family’s needs identified during the *Family Meeting/Home Visit*. Remember to add the *Need Identified Event* after finishing this event. A *Community Resource Referral* form should be attached. No additional notes are required however, you may include additional case management notes, including the names of enrolled children, if it would help with the service you provide the family. **Remember to Time stamp your Event Notes** by selecting the clock icon.

Event Notes

6/17/2020 3:31 PM Elvia Pace Management Analyst Management Analyst
Family met to complete Family Meeting Home visit completed Parent Handbook Module. Family expressed need for uniforms. Refer to Need Identified Event dated 06/17/2020.
<end of entry>

☒ Family Partnership Agreement Complete

- 6) Check the box for **Partnership Agreement Complete**
- 7) Click Save

☒ Family Partnership Agreement Complete

Actions

[Remove Future Home Visits](#) [Add Action](#)

Scheduled	Action Date	Action Type	Description	Status	Case Worker	Referred To	Time
No actions have been entered associated with this event. Click "Add Action" above to add one.							


[Delete Event and Actions](#)

[Save](#)

- 8) Attachments: Follow the ChildPlus Scan Order and Process Guide for **Service Area, Attachment Type, and Description**. Scan and attach a *Family Meeting/Home Visit* form for each child enrolling in the program. If there is a sibling is accepted /enrolled in the program at a later date the FSW is required to create a separate Family/ Meeting Home visit event but not another Parent Handbook Module. In this instance there will be **two** Family Meeting/ Home Visit events and **still only one** Parent Handbook Module.

Family Meeting/Home Visit Documents			
Source Document	Service Area	Attachment Type	Description
Family Meeting/Home Visit Form	Family Services	Family Meeting/Home Visit	2020-2021
Metro Health Dental Evaluation and Fluoride Varnish – Teeth Form	Health	Consent Form	2020-2021 MH
Labs Screening General Consent	Health	Consent Form	2020-2021 UIW
Parent Handbook	Family Services	Family Partnership Agreement	2020-2021
Referrals to any agency	Family Services	Goal Referral or Need Referral	2020-2021

Family Meeting / Home Visit form will be reviewed with the family. In place of parent/guardian signature, staff should write “PHONE” in the signature box. Once complete, a copy should be scanned and sent to parent via text or email. The completed form should be saved as an attachment and events should be created according to the ChildPlus Data Entry Guide. See Re-enrolment and New enrollment procedures provided for further guidance.



**Family and Community Support
Family Meeting / Home Visit Form**

Welcome to the Head Start Program/Early Head-Child Care Partnership Start Program!

We look forward to working with you and your child to provide your family with services supports, and educational opportunities.

Items Given: • Parent Handbook • Consent Forms (Lab and Dental)

ITEMS NEEDED FOR HEAD START/ Early Head-Child Care Partnership Program:

Medical
Physical Exam: ☐ Current/Date: _____ ☐ Expired / Date: _____ ☒ Missing / Physical Form Given
Medical Forms: ☐ Action Plan (Anemia/Severe) ☐ Medication ☒ Special Diet ☐ Other-Specify _____
Medical Home on file: Demetria Aguiar ☐ Updated: _____
Insurance card on file: ☐ Yes # _____ ☒ No Obtained: ☒ Yes ☐ No
Immunizations on file: ☒ Yes ☐ No Obtained: ☐ Yes ☐ No

Dental
Dental Home on file: _____ Updated: Smile Center (Castroville)
☒ Dental Consent Form or Private Dental Exam (If no consent given, you must take your child to their dentist and bring us a completed Private Dental Exam form within 90 days)

Community Resources
Emergency Assistance: ☐ Utilities ☐ Food Assistance ☐ Housing Assistance ☐ Wellness Services
☒ Other: uniforms

Current E-Mail Address: carolbrady@gmail.com
What is the best way to contact you? ☐ Phone ☒ Text ☒ Email

EHS-CCP ONLY

Reminders

- CCS Application
- ASQ
- Attendance

Center Hours

☐ Blessed Sacrament Academy ☐ Seton Home
☐ Ella Austin ☐ YWCA
☐ Healy Murphy ☐ Other: _____
☐ Inman Christian Center

Next Appointment for Assessment and Goal Setting:
Date: _____
Time: _____

First day of School: _____
Other: _____

Parent/Guardian Signature _____ Phone _____

Revised: 11/2017

HEAD START ONLY

School Uniforms for Child:
☐ Referral ☒ Resource Given ☐ No uniforms needed

Reminders

- Transportation: Please Contact your child's school to inquire about School Bus Transportation.
- Uniform Color: Shirt Blue Pants Khaki
- Needed: Small Backpack, Small Blanket, Two Change of clothes - Does not have to be uniforms.
- If your child is not fully potty trained you may need more than two sets of clothes.
- Attendance: School Hours 7:45 - 2:45p
Tardy Bell Rings 7:45 am

First day of School: 8/14/20
Meet the Teacher: 8/14/20 2pm
Other: _____

Date: 06/17/20

Original – Parent
Yellow – Child File

Parent Name: Carol Brady Child's Name: Chloe Brady Date: 6/17/20 Scheduled Date: 6/17/20 App Date/Time: 4:15pm
Address: 1234 Townsend Drive Phone Number: (909) 456-7891



Family & Community Support Services
2020-2021 Family Meeting/Home Visit Checklist

Family Services Tab				
Y/N	Event/Activity	Purpose	Additional Information	Forms to Complete & Scan Into ChildPlus
	Event - Routine Contact	Document efforts to contact parent to schedule FM/HV	N/A	N/A
	Event - Family Meeting/ Home Visit	Follow up/prepare for the 2020-2021 school year	Created and dated when event occurred. See date on FM/HV form.	Family Meeting/ Home Visit Form

Best Practice: We will continue to use the *Family Meeting / Home Visit* Checklist. It is step by step tool organized to list every Event/Activity needed for this event in checklist form so nothing falls through the cracks! Remember to emailing or text a picture of the Family Meeting Home visit form so parents have a record of what was covered during phone visit.

Module: Parent Handbook

COVID will affect this event from previous processes. The Parent Handbook will be reviewed with the parents/guardians during the Family Meeting/Home Visit. The parents will be provided the link to the Parent Handbook so they may follow along to while FSW's are reviewing the Parent Handbook. Information about the importance of child's regular attendance, as well as to promote consistent attendance and the importance of the Family Partnership Agreement are all part of the Parent Handbook. The Family Partnership Agreement is the last page of the Parent Handbook. The parent signature will not be required during the 2020-2021 school year.

- 1) While in the *Family Services* Area, click on the *Parent Handbook* Tab. This is where you will work on the *Parent Handbook*.

Bobby *Brady's Family ▾

Male DOB: 1/01/11 9y 4m CPID: 259123
New 12/20/19 • Year 1 (+2)

Head Start 2019-2020 • San Antonio ISD • < No Site > • < No Classroom > • Head Start.1

Application Enrollment **Family Services** Immunizations Disability Transportation Education Attendance PIR

Events Family Outcomes Family Services Information Attachments (3) Family Correspondence Intensive Case Management **Parent Handbook**

Parent Handbook (1) [Print All Records](#) [Add Parent Handbook](#)

Drag a column header here to group by that column

One Ho...	Support	Improv...	Chronic...	Extende...	Rcvd ha...	Compla...	Attenda...	Safety ...	FPA	Staff	Date
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ayala, Ana Marie	5/19/20...

2) *Welcome and Program Information*

The first section in the Parent Handbook is the *Welcome and Program Information*. The first thing we begin to review with our parents is our partnership with ISD, mission, vision and enrollment.

Parent Handbook

[Print](#) [Save](#) [Cancel Add](#)

Welcome and Program Information

Explain that our Head Start Program is a partnership with the City of the San Antonio and the school district. Head Start believes that you are your child's first and most important teacher and our program is committed to helping you meet your family's needs. Also – you can follow our program on social media for updates and information.

Our Vision: "For every child and every family the best Head Start services every day."

Mission Statement: "Preparing children and engaging families for school readiness and life-long success"

Program Enrollment & Enrollment of Children w/Disabilities - Our program serves children with disabilities. Working with Edgewood ISD, San Antonio ISD, and our child care partners, Head Start is able to provide quality services to all children in an inclusive environment. If you have questions about disability services or your child's development, I can connect you to the Disability Coordinator at the district.

3) *Program Policies and Information*

As you know attendance is crucial for our Head Start program. Other sections to be reviewed in this section are confidentiality, standards of conducts, the importance of reporting suspected child abuse and neglect in addition to toilet training and the community complaint procedure.

Program Policies and Information

Attendance (Page 7): This section talks about establishing a regular routine and the importance of bringing your child to school every day. Explain if a child is absent or going to be absent to please call teacher, school office or FSW within one hour after the start of school. Provide phone number for yourself. Let families know we work as a team and the information will be shared between any one of us once reported. If at any time the parent does not call, the family will be followed up with by either the FSW, the office staff, or both in an attempt to ensure the child's safety. If there are 2 consecutive unreported absences or if there is a pattern of absences, the FSW will begin attempting to make contact up to a home visit in an effort to work with the family to identify any barriers and work through them together. This is the benefit of being part of the Head Start program. Unfortunately, because of their child being enrolled with the ISD, separately, the ISD is responsible for following their procedures and too many absences can result in a court referral and/or hearing for truancy. It is to their benefit to take advantage of the FSW and the resources if a barrier is creating their attendance issues. Towards the end of the handbook, we will again revisit attendance in an Attendance Agreement where we will highlight this section in 6 bullets.

Confidentiality – We follow strict guidelines to ensure that you and your child's information is safe and secured. We follow HIPAA, Head Start, and school district privacy guidelines.

Standards of Conduct (Page 8): All of our staff abide by and sign the Standards of Conduct.

Reporting Suspected Child Abuse and Neglect – Our priority is the well-being and safety of our children. All of our staff are mandated reporters. That mean if any Head Start staff, contractor, teacher, or volunteer suspects a child has been the victim of child abuse or neglect, we are required by law to report it.

Toilet Training - A child will not be denied enrollment into the Head Start Prekindergarten Program if they are not potty trained. Head Start staff will team with parents/guardians to teach toileting skills to children. Please talk with your child's teacher for additional information.

Community Complaint Procedure (Page 10): If you ever have a question or concern regarding Head Start services, please talk with your child's teacher and principal. If you are unable to resolve your concern, you can read more about the next steps on pg. 10

4) *Nutrition and Health Information*

Health is a very information component of our Head Start Program. It is what sets us apart from other programs. Health includes Nutrition, Dental and Health services.

Nutrition and Health Information

Meal Services – All children receive a nutrition assessment to ensure your child's nutritional needs are met. Please communicate with staff if your child has any food allergies or intolerances, cultural/ personal preferences, or any nutrition related health problems and feeding requirements throughout the year. Head Start and EHS-CCP follow USDA standards. Foods served are high in nutrients and low in fat, sugar, and salt. All children are provided a nourishing breakfast, lunch, and snack. For the health and safety of all children, only meals and snacks prepared at school will be served to children during the school day, including field trips. For birthday and holiday celebrations, please talk with your child's teacher about the best way to celebrate these events.

Dental Screenings - Our program partners with Metro Health to provide a free onsite dental/oral screening and fluoride varnish, as appropriate, to all enrolled children. Dental/ oral screenings are performed by a licensed dentist and occur in the fall and spring during the program year. Head Start requires all children, six months and older, have dentist, so we will check in with you regarding your child's dentist.

Health Services – We know that children that are healthy are better prepared for school. We are required to collect the following information

- o Current physical or well-child exam
- o Copy of current immunization record
- o Proof of current health insurance
- o Medical and Dental Home information
- o Care plans and medication instructions from a physician for health concerns, such as asthma, diabetes, allergies, etc. These forms must be updated each year
- o Special Diet documentation and allergy information from a child's doctor
- o Lead screening results (usually done at 12 and 24 months of age). If your child's doctor does not have a screening result on file, then a blood lead screening should be completed as soon as possible. If your child is missing a lead screening, the program can provide the screening free of charge.
- o Our program will also provide hearing and vision screenings, developmental and social/emotional screenings
- o Be sure that if your contact information changes or if your child or family are experiencing health related concerns, to please let me know.

5) *Education Information*

Part of the Head Start programs success is the relationship we have with the ISD's to empower parents to be their child's first teachers. Our School Readiness Goals list our skills and knowledge that our program focuses. Education goes beyond instruction in the classroom. Head Start provides home visits, discipline and guidance, screening and assessments for the children, Ready Rosie- a tool that provides interactive activities for families and Wellness Support Services to assist families in their well-being goals.

Education Information

School Readiness Goals – You will find our program school readiness goals. This is a list of our skills and knowledge that our program focuses on.

Home Visits & Parent Teacher conferences – Teachers are required to complete two Home Visits and two Parent Conferences each year. The purpose is to learn about your child and family and discuss your child's development and progress. Also a time to share any concerns.

Discipline and Guidance (page 16): Talks about how the Head Start promotes positive discipline and guidance that encourages building self-esteem and self-control.

Screenings and Assessments – Children receive a screening within the first 45 days of school. These screenings are call the Ages and Stages Questionnaires. Your child's teacher will provide additional information about the screenings. Teachers also conduct assessments three times a year to see what your child has learned and which areas to continue to work.

Ready Rosie – All families receive a subscription to Ready Rosie. This is an interactive tool that sends parents/guardians videos of activities to do at home. Be sure that your email address and phone number are up to date. You will receive a text and email with more information.

Wellness Support Services

6) *Parent Engagement*

Parent Engagement is one of the fields that Family and Community help families thrive in Head Start. Policy Council and Parent Connection Committees provide parents with trainings and leadership opportunities. Families are given parent engagement opportunities that build community partnerships which provide services for our families to assist in their needs and goals to build strengths thru support and community referrals.

Parent Engagement

Policy Council and Parent Connection Committee (Page 19): Being part of the policy council and parent connection committee provides parents the opportunity to advocate for best interest of the program and encouraged to make recommendations.

Opportunities for Parent Engagement (Page 20): These opportunities are offered from the moment your child becomes a participant in the program. Activities, trainings, sub-committees, etc. are created as an opportunity to build relationships and new skills. They are offered throughout the year, you will be notified of all opportunities to volunteer.

Supporting and Community Referrals (Page 21): Our program create partnerships with community programs and agency to provide information and resources to assist and support your family long after you exit the program. Our goal is to make you familiar with all the resources our city has to offer to meet your needs.

Goal Setting (Page 21): The Head Start program will support families in making plans to achieve their goals and provide encouragement by checking in on progress and offering support, resources and referrals to achieving success.

7) *Safety and Transportation*

Providing Education for families on Safety and Transportation is an important role for Head Start. Ensuring families safety on and off campus is reviewed in the Parent Handbook to include but limit to safety when boarding and around buses, tips when crossing the street as well as review transportation services for families that qualify.

Safety and Transportation

Safety and Transportation (Page 23):

Please discuss the following with the family:

In an effort to keep children and families safe, our handbook also includes safety and transportation information. Tips to help keep you and your child safe when crossing the street and around other cars and buses. Don't forget to talk to children about safety around cars, especially at school when there are cars and buses in the parking lot.

Pedestrian and School Bus Safety

Transportation Services – Bus services may be available to families that qualify. You can let me or your child's teacher know if you need bus services. We can provide the contact information to see if you qualify.

8) *Attendance Agreement*

The attendance agreement explains the importance of regular daily attendance and communication to ensure the child is ready for school and creates positive attendance habits. Each section reviewed will be indicating by placing a check mark in the box provided.

Attendance Agreement

Attendance Agreement (Page 27): Please explain the importance of regular attendance to the family. Attendance will help ensure their child is ready for school and learning throughout life.

Please read and review the following with the family:

- ☒ My Child must maintain regular attendance
- ☒ I will contact my child's teacher and/or Family Support Worker the day before and up to one hour before the start of the school day if my child will not be at school
- ☒ My Family Support Worker supports me and my family. When my child is absent, they will visit with me and offer support and possible ideas.
- ☒ If my child is absent too many times, I may be placed on an attendance improvement plan.
- ☒ If my child's chronic absenteeism continues, the program will work with me to resume attendance. If my child's attendance does not resume, then the program may
- ☒ If my child will be away from school for an extended period of time, I will discuss this with my child's teacher or Family Support Worker ahead of time.

9) *Family Partnership Agreement*


The Family Partnership Agreement will serve as a guide to list the responsibilities of both the family and Family Support Worker. Each section reviewed will be indicating by placing a check mark in the box provided.

Family Partnership Agreement

Family Partnership Agreement (Page 22): Review each "As a parent" and " as a Head Start Staff member"

By enrolling your child in our program, you are joining us in focusing on positive child and family outcomes to build a better future for the children, families and communities served by the City of San Antonio Head Start and EHS-CCP program.

To reach this goal, we need to work together as equal partners. Please join us by following through on the Head Start Family Partnership Agreement.



☒ Reviewed the Parent Handbook with parent and explained the program requirements.

☒ Reviewed the Head Start Community Compliant Procedure with the parent.

☒ Reviewed the Attendance Agreement with the family and discussed the importance of their child's daily attendance. Also reviewed how attendance is a priority th

☒ I have reviewed the safety and transportation information outlined in the Parent Handbook. Also asked parent to share this important safety information with th


☒ Reviewed the Head Start Family Partnership Agreement, and confirmed the family agrees to follow through on their responsibilities as a Head Start parent/guarc

10) *Acknowledgement*


Once the Parent Handbook is reviewed with parents enter your name in the section "Parent Handbook Review Completed by". Also indicate the date in which the items were reviewed.

Acknowledgement

Parent Handbook Review Completed by:

Cano, Diana 

Date

6/17/20 


11) Click *Save as Attachment* at the top of the module to save a PDF form in ChildPlus.

Parent Handbook

all opportunities to volunteer.

Supporting and Community Referrals (Page 21): Our program create partnerships with community programs and agency to provide information and resources to assist and support your family long after you exit the program. Our goal is to make you familiar with all the resources our city has to offer to meet your needs.

Goal Setting (Page 21): The Head Start program will support families in making plans to achieve their goals and provide encouragement by checking in on progress and offering support, resources and referrals to achieving success.

Save As Attachment  Cancel Delete

- 12) Once all information is entered Click green Save button. The entry will be saved under the Parent Handbook Module.

Bobby *Brady's Family ▾

Male DOB: 1/01/11 9y 4m CPID: 259123
New 12/20/19 • Year 1 (+2) Head Start 2019-2020 • San Antonio ISD • < No Site > • < No Classroom > • Head Start.1

Application Enrollment **Family Services** Immunizations Disability Transportation Education Attendance PIR

Events Family Outcomes Family Services Information Attachments (3) Family Correspondence Intensive Case Management Parent Handbook

Parent Handbook (1) [Print All Records](#) [Add Parent Handbook](#)

Drag a column header here to group by that column

One Ho...	Support	Improv...	Chronic...	Extende...	Rcvd ha...	Compla...	Attenda...	Safety ...	FPA	Staff	Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Cano, Diana	6/17/20...

- 13) After you save entry, go into Attachment tab to edit Parent handbook entry. Find Data Entry Screen Snapshot. Highlight and click Edit Details.

Application Enrollment Family Services **Health** Immunizations Disability Transportation Education Attendance PIR

Events Family Outcomes Family Services Information **Attachments (6)** Correspondence Intensive Case Management Parent Handbook

Family Services [Add Attachment](#) [View](#) [Delete](#)

	Service Area	Attachment Type	Description	Date Added	Added By	File Name	Size
	Family Services	Goal Referral	2019-2020	6/20/2019	Pace, Elvia	CBrady Goal ...	200,340
	Family Services	Goal Setting/Strengths Survey	2019-2020	6/20/2019	Pace, Elvia	CBrady Goal ...	254,659
	Family Services	Data Entry Screen Snapshot	Parent Handb...	6/15/2020	Pace, Elvia	Parent Hand...	
	Familv Services	Goal Referral	2019-2020	6/20/2019	Pace, Elvia	CBradv Goal ...	217,745

- 14) Once in edit window, follow Scan and Attach Guide for Family Partnership Agreement, then click Save.

Edit Attachment Information

File to Attach (20MB Max)

Service Area: Family Services

Attachment Type: **Family Partnership Agreement**

Description: 2020-2021

Notes: 6/15/2020 4:35 PM Elvia Pace Management Analyst Management Analyst
<end of entry>
Parent Handbook screen as of 6/15/20 at 4:29 PM saved by Elvia Pace

Time-Saving Tips [Save](#)

Family Meeting/Home Visit Documents

Source Document	Service Area	Attachment Type	Description
Family Meeting/Home Visit Form	Family Services	Family Meeting/Home Visit	2020-2021
Metro Health Dental Evaluation and Fluoride Varnish – Teeth Form	Health	Consent Form	2020-2021 MH
Labs Screening General Consent	Health	Consent Form	2020-2021 UIW
Parent Handbook	Family Services	Family Partnership Agreement	2020-2021
Referrals to any agency	Family Services	Goal Referral or Need Referral	2020-2021

Parent Handbook

Bobby *Brady's Family Male DOB: 1/01/11 9y 5m CPID: 259123

Welcome and Program Information

Explain that our Head Start Program is a partnership with the City of the San Antonio and the school district. Head Start believes that you are your child's first and most important teacher and our program is committed to helping you meet your family's needs. Also – you can follow our program on social media for updates and information. Our Vision: "For every child and every family the best Head Start services every day." Mission Statement: "Preparing children and engaging families for school readiness and life-long success" Program Enrollment & Enrollment of Children w/Disabilities - Our program serves children with disabilities. Working with Edgewood ISD, San Antonio ISD, and our child care partners, Head Start is able to provide quality services to all children in an inclusive environment. If you have questions about disability services or your child's development, I can connect you to the Disability Coordinator at the district.

Program Policies and Information

Attendance (Page 7): This section talks about establishing a regular routine and the importance of bringing your child to school every day. Explain if a child is absent or going to be absent to please call teacher, school office or FSW within one hour after the start of school. Provide phone number for yourself. Let families know we work as a team and the information will be shared between any one of us once reported. If at any time the parent does not call, the family will be followed up with by either the FSW, the office staff, or both in an attempt to ensure the child's safety. If there are 2 consecutive unreported absences or if there is a pattern of absences, the FSW will begin attempting to make contact up to a home visit in an effort to work with the family to identify any barriers and work through them together. This is the benefit of being part of the Head Start program. Unfortunately, because of their child being enrolled with the ISD, separately, the ISD is responsible for following their procedures and too many absences can result in a court referral and/or hearing for truancy. It is to their benefit to take advantage of the FSW and the resources if a barrier is creating their attendance issues. Towards the end of the handbook, we will again revisit attendance in an Attendance Agreement where we will highlight this section in 6 bullets. Confidentiality – We follow strict guidelines to ensure that you and your child's information is safe and secured. We follow HIPAA, Head Start, and school district privacy guidelines. Standards of Conduct (Page 8): All of our staff abide by and sign the Standards of Conduct. Reporting Suspected Child Abuse and Neglect – Our priority is the well-being and safety of our children. All of our staff are mandated reporters. That means if any Head Start staff, contractor, teacher, or volunteer suspects a child has been the victim of child abuse or neglect, we are required by law to report it. Toilet Training – A child will not be denied enrollment into the Head Start Prekindergarten Program if they are not potty trained. Head Start staff will team with parents/guardians to teach toileting skills to children. Please talk with your child's teacher for additional information. Community Complaint Procedure (Page 10): If you ever have a question or concern regarding Head Start services, please talk with your child's teacher and principal. If you are unable to resolve your concern, you can read more about the next steps on pg. 10

Nutrition and Health Information

Meal Services – All children receive a nutrition assessment to ensure your child's nutritional needs are met. Please communicate with staff if your child has any food allergies or intolerances, cultural/ personal preferences, or any nutrition related health problems and feeding requirements throughout the year. Head Start and EHS-CCP follow USDA standards. Foods served are high in nutrients and low in fat, sugar, and salt. All children are provided a nourishing breakfast, lunch, and snack. For the health and safety of all children, only meals and snacks prepared at school will be served to children during the school day, including field trips. For birthday and holiday celebrations, please talk with your child's teacher about the best way to celebrate these events. **Dental Screenings –** Our program partners with Metro Health to provide a free onsite dental/oral screening and fluoride varnish, as appropriate, to all enrolled children. Dental/ oral screenings are performed by a licensed dentist and occur in the fall and spring during the program year. Head Start requires all children, six months and older, have dentist, so we will check in with you regarding your child's dentist. **Health Services –** We know that children that are healthy are better prepared for school. We are required to collect the following information: o Current physical or well-child exam o Copy of current immunization record o Proof of current health insurance o Medical and Dental Home information o Care plans and medication instructions from a physician for health concerns, such as asthma, diabetes, allergies, etc. These forms must be updated each year o Special Diet documentation and allergy information from a child's doctor o Lead screening results (usually done at 12 and 24 months of age). If your child's doctor does not have a screening result on file, then a blood lead screening should be completed as soon as possible. If your child is missing a lead screening, the program can provide the screening free of charge. o Our program will also provide hearing and vision screenings, developmental and social/emotional screenings o Be sure that if your contact information changes or if your child or family are experiencing health related concerns, to please let me know.

Printed by epice on 6/15/20 at 3:27 PM

Page 1 of 3

Event: Family Assessment (Beginning of Year- BOY)

- 1) While in the *Family Services Area*, click on the *Family Outcomes Tab*. This is where you will work on the *Family Assessment* in the Family Outcome tab.

Bobby *Brady's Family

Male DOB: 1/01/11 9y 4m CPID: 259123
New 12/20/19 • Year 1 (+2)

Flags Send Message Save

Head Start 2019-2020 • San Antonio ISD • < No Site > • < No Classroom > • Head Start.1

Application Enrollment **Family Services** Applications Disability Transportation Education Attendance PIR

Events **Family Outcomes** Information Attachments (3) Family Correspondence Intensive Case Management Parent Handbook

Family Services Events Options Add Event

Date	Event	Description	Associated With	Progress	Time	Case Worker	Actions
9/09/20	Need Identified	Utility Assistance	Family	In Progress	0 h 0 m	Pace, Elvia	0
2/17/20	Family Meeting/Home Visit	2019-2020	Family		0 h 0 m	Pace, Elvia	0

- 2) Select the current program year (ex 2020-2021) under the *Family Outcomes* Tab.
- 3) Select Enter Results under the *Beginning of the Year* column.
There should only be one assessment per family. If there are siblings on your caseload, you will be assigned to assist the family. Please see your supervisor for guidance. There is a Participants area on the right top hand corner of the assessment (circled below) that will number how many participants there are for the family.

Bobby *Brady's Family ▾

Male DOB: 1/01/11 9y 4m CPID: 259123
 New 12/20/19 • Year 1 (+2)

Head Start 2019-2020 • San Antonio ISD • < No Site > • < No Classroom > • Head Start.1

Application Enrollment **Family Outcomes** Health Immunizations Disability Transportation Education Attendance PIR

Events Family Outcomes **Enter Results** Information Attachments (3) Family Correspondence Intensive Case Management Parent Handbook

2019-2020 School Year • San Antonio ISD 5 School Year Records **Participants (1)**

Family Assessment 2019-2020
 Lower Score Means Greater Need

Beginning of Year End of Year

Not Enrolled Not Enrolled

Enter Results

General

- EMERGENCY CRISIS INTERVENTIONS
- HOUSING
- SAFETY
- CHILD EDUCATION AND DEVELOPMENT
- PARENTING

Reminder: Once the year has been verified, a due date will appear under the *Beginning of Year (BOY)* column indicating by when all BOY assessments must be completed. This date indicates the last date listed on the Benchmark Due Date Guide for data entry of *Family Assessments*. There are exceptions for children who are enrolled after the first day of school. Guidance for data entry dates on these cases are outlined in the Benchmark Due Date Guide.

- 4) Assessment Completed: Enter the date the actual event occurred
- 5) Case Worker: Enter Your Name

Results for Family Assessment 2018-2019 - Peter *Brady's Family

Beginning of Year Assessment

Assessment Completed 9/30/19

Case Worker Farias-Ybarra, Cassandra

2018-2019 School Year • San Antonio ISD

☐ Not Assessed

General

- EMERGENCY CRISIS INTERVENTIONS
- HOUSING
- SAFETY
- CHILD EDUCATION AND DEVELOPMENT

EMERGENCY CRISIS INTERVENTIONS
 Scoring Guidance
 Do you need immediate assistance with food, clothing, shelter, other?
 3: Strength
 •Has basic needs met
 •Knows where to find help
 •Lives in a community where resources are abundant

- 6) The *General* section lists the areas the families will be assessed on. There is Scoring Guidance listed on the side. The Scoring Guidance provides examples to assist staff in selecting the family's score. 3= Strength 2= Adequate 1=Need

Results for Family Assessment 2018-2019 - Peter *Brady's Family

Beginning of Year Assessment

Assessment Completed: 9/30/19

Case Worker: Farias-Ybarra, Cassandra

2018-2019 School Year • San Antonio ISD

☐ Not Assessed

General

- EMERGENCY CRISIS INTERVENTIONS 2
- HOUSING 2
- SAFETY 3
- CHILD EDUCATION AND DEVELOPMENT 2
- PARENTING 1
- EDUCATION 1
- HEALTH EDUCATION 2
- FAMILY SUPPORT 2
- TRANSPORTATION 1
- ADVOCACY AND LEADERSHIP DEVELOPMENT 2
- TRANSITIONS 3

TRANSITIONS Scoring Guidance

Have you had any other children in your family who has moved between two programs such as an early Learning Program, Early Head Start, Head Start or Kindergarten?

3: Strength

- *Has participated in a HS, etc. and is aware of the changes that may/will occur
- *Aware of school registration process and has support (family and friends)
- *Uses transition times to help their child learn. Talks about issues that may come up

2: Adequate

- *Would like to attend Transitional Meetings to talk about changes upcoming
- *Feels comfortable asking for a meeting/sharing with child's Teacher
- *Is patient/understanding with their child when they are transitional

1: Need

- *Unaware how to register their child for other programs/other choices
- *Does not know how to support their child when he/she transitions
- *Not comfortable asking for a meeting/sharing with teacher about their child

Best Practice: Scores are determined during a conversation you have with the family. Letting families know you will be taking notes to help you serve them better is a good way to keep notes to help you score at a later date. Remember to take family's potential growth in each section into consideration. If you score a family a "3" in every area, you will not be able to give the family credit for the work they did for their family during the school year.

- 7) After scoring under the *General* Section BOY observations should be detailed in the notes section. **Remember to Time stamp your Event Notes** by selecting the clock icon. Click Save when done.

Beginning of Year Assessment Notes

6/18/2019 7:09 PM Elvia Pace Management Analyst Management Analyst

Mom is aware where she can go to get help in some areas if needed. She expressed a desire to find housing closer to her work. She reported she struggles to keep up with her children and wants help to work on her patience. She would also like to go back to school next summer because her mom drives her and she needs time to get her license.

<end of entry>

What is one dream you have for your family/ child? To read more to her children more.

ers from Another Assessment

Save Cancel

- 8) If a Family does not wish participate in the assessment, notate it under the Not Assessed section.

Results for Family Assessment 2018-2019 - Peter *Brady's Family

Beginning of Year Assessment

Assessment Completed: 9/30/19

Case Worker: Farias-Ybarra, Cassandra

2018-2019 School Year • San Antonio ISD

☒ Not Assessed

Family Declined

Scheduling Conflict

General

- EMERGENCY CRISIS INTERVENTIONS
- HOUSING

EMERGENCY CRISIS INTERVENTIONS Scoring Guidance

Do you need immediate assistance with food, clothing, shelter, other?

3: Strength

- 9) Family information can be left in the Boy Notes section. **Remember to Time stamp your Event Notes.** Click Save when done.

Beginning of Year Assessment Notes

9/30/2019 5:35 PM Elvia Pace Management Analyst Management Analyst

Child has a Case Worker and family is not available to conduct the assessment.
<end of entry>

What is one dream you have for your family/ child? Be able to exit out of the CPS system.

vers from Another Assessment

Save

Information scored in the *General* section of the assessment is calculated and will appear on the front page of the *Family Outcomes* Tab as shown below. This will calculate how the family is doing at the beginning of the year. A lower score is an indication of a greater need for this family. A due date will now appear under the End of Year column to indicate the date by which the *EOY Assessment* must be completed.

Application Enrollment Family Services Health Immunizations Disability Transportation Education Attendance PIR

Family Outcomes Family Services Information Attachments (0) BOY Wellness Assessment EOY Wellness Assessment

2018-2019 School Year • San Antonio ISD 4 School Year Records Participants (1)

Family Assessment 2018-2019 Beginning of Year End of Year

Lower Score Means Greater Need

21 Completed 9/30/19 Farias-Ybarra, Cassandra Edit

Due 5/10/2019 Enter Response

General	21	64%
EMERGENCY CRISIS INTERVENTIONS	2	
HOUSING	2	
SAFETY	3	
CHILD EDUCATION AND DEVELOPMENT	2	
PARENTING	1	
EDUCATION	1	
HEALTH EDUCATION	2	
FAMILY SUPPORT	2	
TRANSPORTATION	1	
ADVOCACY AND LEADERSHIP DEVELOPMENT	2	
TRANSITIONS	3	
Grand Total	21	64 %
Frequency of Responses		
3.0 Strength	2	
2.0 Adequate	6	
1.0 Need	3	

Notes

Beginning of Year 6/18/2019 7:09 PM Elvia Pace Management Analyst Management Analyst

Mom is aware where she can go to get help in some areas if needed. She expressed a desire to find housing closer to her work. She reported she struggles to keep up with her children and wants help to work on her patience. She would also like to go back to school next summer because her mom drives her and she needs time to get her license.
<end of entry>

Reminder: All staff must adhere to the Benchmark Due Date Guide.

BOY assessments completed on or after March 1st do not require an *EOY assessment* to be completed. If you have any questions please seek direction from your supervisor.

Event: Family Assessment (End of Year- EOY)

- 1) Verify school year. A due date will appear under the *End of the Year (EOY)* column indicating by when all *EOY assessments* must be completed. This date indicates the last date listed on the Benchmark Due Date Guide for data entry of *Family Assessments*. All staff must still adhere to the Benchmark Due Date Guide.
- 2) Select Enter Results under the End of Year column to begin the *EOY Assessment*.

The screenshot shows the 'Family Assessment' interface for the 2018-2019 school year. It displays a 'Beginning of Year' section with a score of 21 and an 'End of Year' section with a due date of 5/10/2019. The 'Enter Results' button under the 'End of Year' section is circled in blue and has a yellow arrow pointing to it.

- 3) Assessment Completed: Enter the date the actual event occurred
- 4) Case Worker: Enter Your Name

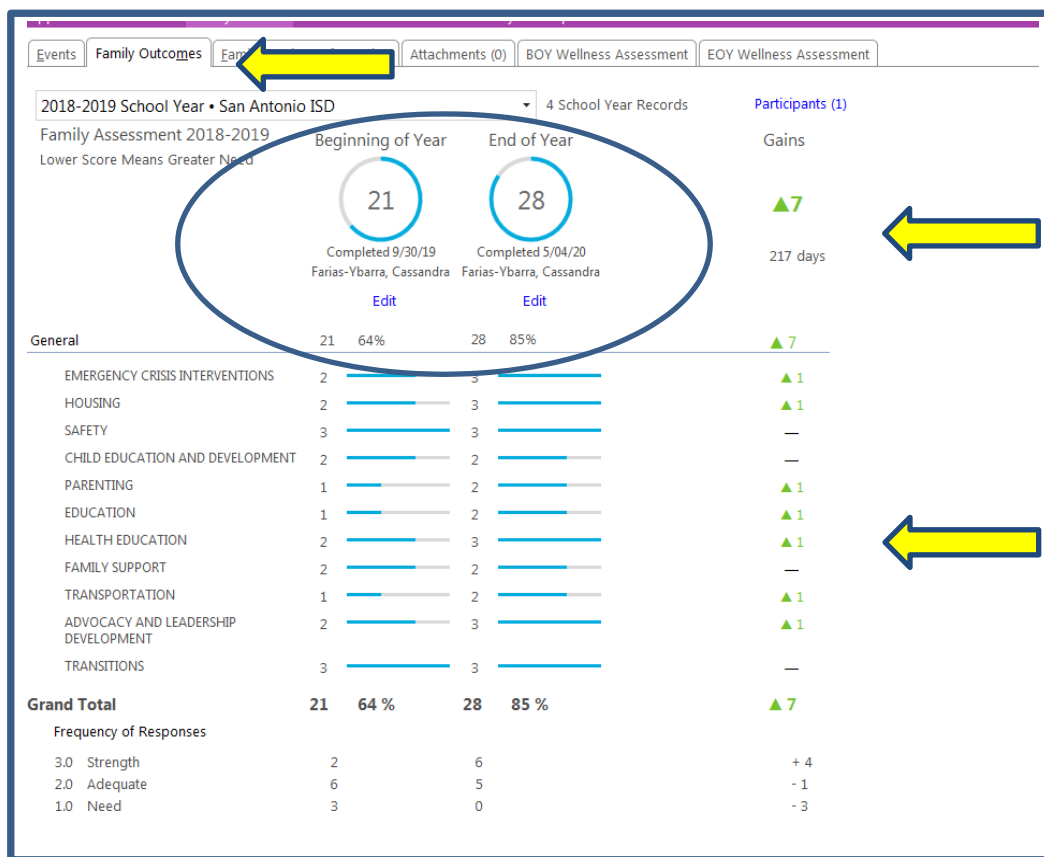
The screenshot shows the 'End of Year Assessment' form. The 'Assessment Completed' date field is set to 5/4/20 and the 'Case Worker' dropdown menu is set to Farias-Ybarra, Cassandra. Both fields are highlighted with yellow arrows.

- 5) You will repeat the same process as the BOY. The EOY scoring is not only based on the family's conversation but also improvement and participation they may have had on campus during the school year.
- 6) **Remember to Time stamp your Event Notes** by selecting the clock icon and add your EOY observations in the EOY notes section and click save.

The screenshot shows the 'End of Year Assessment Notes' section. It displays a timestamped note: '5/4/2020 3:54 PM Elvia Pace Management Analyst Management Analyst Mom was able to apply for a Habitat home and is scheduled to move in over the summer. She was a very active volunteer and although she did not win a position on the Policy Council she attended every Parent Committee meeting and helped on campus. Mom was able to obtain her license and is saving up to buy her own vehicle. <end of entry>'. The 'Save' button is highlighted with a yellow arrow.

Information scored in the General section of the *EOY assessment* is calculated and will appear on the front page of the *Family Outcome* Tab. Point in time scores will show side by side for both the BOY and EOY once completed.

A new column will appear on the right hand side of the screen labeled Gains. This column will show an increase or decrease in scores between the BOY and EOY. If there are any gains the family has made, it will be indicated here for each topic in the general section.



Additional Information:

The participation in the *Family Assessment* process is not only a benefit of our Head Start program it is listed in our Head Start Standards and Policies that an assessment will be offered to every family.

Head Start Performance Standards: 1302.52 (b) Identification of family strengths and needs. A program must implement intake and family assessment procedures to identify family strengths and needs related to the family engagement outcomes as described in the Head Start Parent Family and Community Engagement Framework.

COSA DHS HS Program Policy 2 Family Partnership Services Family and Community Support.

Family and Community Support staff will: Use a Family Assessment tool to identify each family's strengths, needs and interests.

Event: Participation in the Family Goal Setting

The *Family Goal* event is created as the process occurs. The *Family Goal* is offered in conjunction with the *Family Assessment*. Our families come with very different dynamics, needs, strengths and structures so having the same approach to our assessment and goal setting process may be a little different. What remains the same is that we follow a parent driven approach. Listening to the parent will provide nuggets of information that will help you guide the families through the family goal process allowing them to select a family goal. It is all in the approach!

Although we have a vast selection of goals that the families can choose from handing them a piece of paper or card with goals on it may not be the most effective approach. Using the assessment tool provides us insight into their families and will highlight goals they may like to work on with your guidance.

Once you have selected a goal follow the guidance below on how to enter the Family Goal Event in the *Family Services* area in ChildPlus. The *Family Goal* Event entering process has been improved to provide better service for the parent and allows us to maintain more efficiently. Please use Data Entry Guide as you proceed with *Family Goals*. Errors in the data entry may result in having to go back and correct old entry processes.

Best Practice: Review this portion of the data entry guide in its entirety before proceeding with this event. The Family Goal Event entering process has been improved to provide better service for the parent and allows us to report more efficiently. Please use ChildPlus Data Entry Guide as you proceed with Family Goals. Errors in the data entry may result in having to go back and correct old entry processes.

Additional Information:

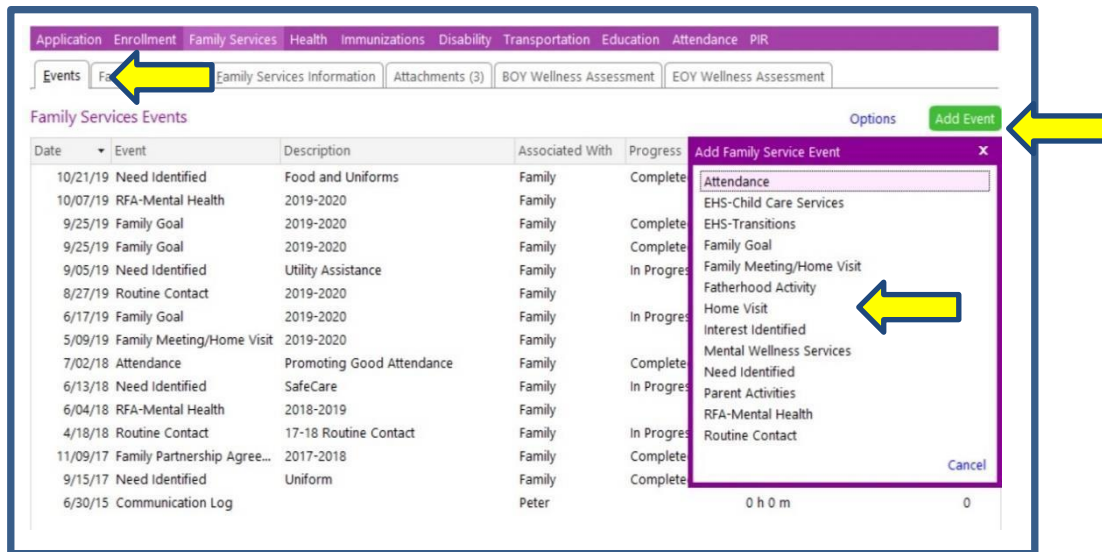
The participation in the Family Goal process is not only a benefit of our Head Start program it is listed in our Head Start Standards and Policies that a goal will be offered to every family.

Head Start Performance Standards: 1302.50 (b) Family engagement approach. A program must: (3) Collaborate with families in a family partnership process that identifies needs, interests, strengths, goals and services and resources that support parent-child relationships....

COSA DHS HS Program Policy 2 Family Partnership Services Family and Community Support.

Family and Community Support staff will: Work with Families to develop family goals. The goal setting process must include: family goals, strategies for success, staff support to be provided, timeframes, and community resources that are available to assist families in meeting their goals. Families must be provided a copy of their Goal Setting forms. Progress on goal attainment is to be tracked until completion or until the end of the school year, based on the goal timeline.

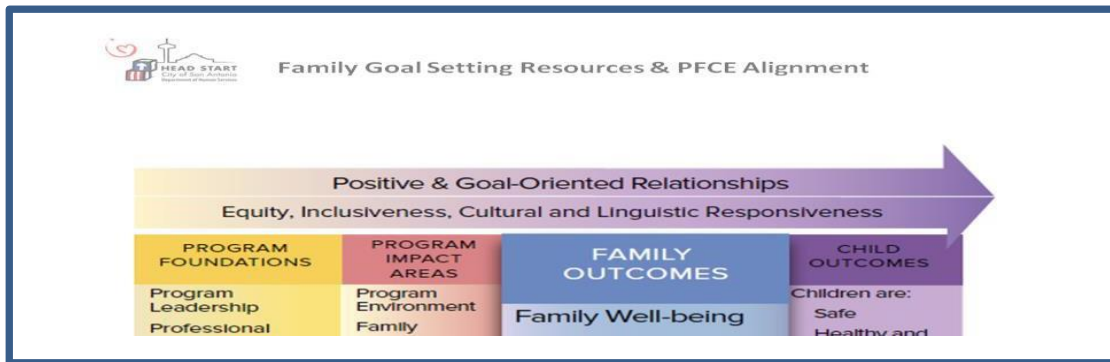
- 1) Click *Add Event* in the *Family Services* Area in the *Events* Tab. Then click *Family Goal*. (Note at time of print screen creation for the ChildPlus Data Entry Guide EHS still needed *Family Goal* Events for Family Life Practice, Family Self Sufficiency, Support for Children and Support for Families to still be accessed.)



- 2) Initial Date: **This date reflects the date the Family Goal was completed.** This event should not be created when you begin the process of contacting the family to schedule time for the *Family Goal*. Correspondence for time set up and missed appointments should be detailed in *Routine Contacts* Event (instructions given below.)
- 3) Description: School Year (ex 2020-2021)

The screenshot shows the 'Add Family Goal' form. It includes fields for 'Initial Date' (9/25/19), 'Description' (2019-2020), 'Service Area', 'Issue', 'Family Outcome', 'Progress', 'Date Closed', and 'Result'. Yellow arrows point to the 'Initial Date', 'Description', and 'Family Outcome' fields.

For Steps 4-6 Use your Family Goal Setting Resource & PFCE Alignment Handout.



This is a new resource for the 2020-2021 school year which aligns our Family Goal Categories, *Family Goal* Sections and *PFCE Framework*. This will be beneficial in data entry improvements made this year.

The table is titled 'Family Life Practice Goals' and is divided into three columns: 'Section', 'Goal', and 'Family Engagement Outcomes'. A yellow arrow points to the 'Family Engagement Outcomes' column.

Section	Goal	Family Engagement Outcomes
Family Routines	Family Routines	Families as Lifelong Educators
	Attendance	Families as Lifelong Educators
Language and Experience Rich Environment	Encouragement and Positive Language Skills	Families as Lifelong Educators
	Parent/Child Activities in the Community	Family Connections to Peers and Community
	Parent/Child Activities	Positive Parent-Child Relationships

4) Service Area: Select *Family Goal* Category interest.

The screenshot shows the 'Add Family Goal' form. The 'Family Outcome' dropdown menu is open, showing a list of goals: 'Goal 1: Family Life Practice', 'Goal 2: Support for Children', 'Goal 3: Family Self-Sufficiency', 'Goal 4: Support for Families', 'Goal 5: Leadership', 'Goal 6: Other', and 'Goal 7: No Goal'. A yellow arrow points to this dropdown menu.

Initial Date: 9/25/19
 Description: 2019-2020
 Service Area: [dropdown]
 Issue: [dropdown]
 Family Outcome: [dropdown]
 Event Notes: [text area]

Case Worker: Farias-Ybarra, Cassandra
 Progress: [dropdown]
 Date Closed: [calendar icon]
 Result: [dropdown]

5) Issue: Select *Family Goal* Section of interest

The screenshot shows the 'Add Family Goal' form. The 'Initial Date' is 9/25/19, 'Description' is 2019-2020, 'Service Area' is Goal 1: Family Life Practice, and 'Case Worker' is Farias-Ybarra, Cassandra. The 'Issue' dropdown menu is open, showing a list of options: Attendance, Discipline, Encouragement and Positive Language, Family Routines, Parent Involvement in Child's Learning, Parent/Child Activities, Parent/Child Activities in the Community, Participation in Support, Reading at Home with Child, and Volunteering. A yellow arrow points to 'Family Routines'.

6) Family Outcome: Select the *PFCE Framework Alignment* Outcome of interest

The screenshot shows the 'Add Family Goal' form. The 'Initial Date' is 9/25/19, 'Description' is 2019-2020, 'Service Area' is Goal 1: Family Life Practice, and 'Case Worker' is Farias-Ybarra, Cassandra. The 'Issue' dropdown menu is open, showing a list of options: Families as Lifelong Educators, Family Well-Being, Positive Parent-Child Relationships, Families as Learners, Family Engagement in Transitions, Family Connections to Peers and Community, and Families as Advocates and Leaders. A yellow arrow points to 'Families as Lifelong Educators'.

7) Case Worker: Enter Your Name

8) Progress: Status of *Family Goal*

The screenshot shows the 'Add Family Goal' form. The 'Initial Date' is 9/25/19, 'Description' is 2019-2020, 'Service Area' is Goal 1: Family Life Practice, 'Issue' is Family Routines, and 'Family Outcome' is Families as Lifelong Educators. The 'Case Worker' field is Farias-Ybarra, Cassandra, and the 'Progress' dropdown menu is open, showing a list of options: In Progress, Not Started, and Completed. A yellow arrow points to 'In Progress'.

- 9) Event Notes: Time Line of *Follow Up*. Use only Month and Full Year in Goal Timeline.
Remember to Time stamp your Event Notes by selecting the clock icon.

Add Family Goal

Initial Date: 9/25/19
 Description: 2019-2020
 Service Area: Goal 1: Family Life Practice
 Issue: Family Routines
 Family Outcome: Families as Lifelong Educators

Case Worker: Farias-Ybarra, Cassandra
 Progress: In Progress
 Date Closed:
 Result:
 Add Action

Event Notes: 9/25/2019 12:46 PM Elvia Pace Management Analyst Management Analyst
 Timeline: 09/2019, 10/2019, 11/2019, 12/2019, 03/2020
 <end of entry>

Actions

Scheduled	Action Date	Action Type	Description	Status	Case Worker	Referred To	Time
No actions have been entered associated with this event. Click "Add Action" above to add one.							

- 10) Resources: Click *Add Action*

When giving out a resource to assist the parent in completing a goal it follows the same process as the *Need Identified* Referral Section except you do not make a *Need Identified* Event the *Add Actions* are to be captured in the *Family Goal* Event.

Add Family Goal

Initial Date: 9/25/19
 Description: 2019-2020
 Service Area: Goal 1: Family Life Practice
 Issue: Family Routines
 Family Outcome: Families as Lifelong Educators

Case Worker: Farias-Ybarra, Cassandra
 Progress: In Progress
 Date Closed:
 Result:
 Add Action

Event Notes: 9/25/2019 12:46 PM Elvia Pace Management Analyst Management Analyst
 Timeline: 09/2019, 10/2019, 11/2019, 12/2019, 03/2020
 <end of entry>

Actions

Scheduled	Action Date	Action Type	Description	Status	Case Worker	Referred To	Time
No actions have been entered associated with this event. Click "Add Action" above to add one.							

Best Practice: Although the Family Goal Event (Yes or No) has a Benchmark Due Date Data Guide deadline for completion you should strive to work ahead of that date. As with all tasks, you should strive to never allow the deadlines to chase you. Always stay five steps ahead and you will not feel the pressures of the Benchmark Guide. The people who always end up winning, when we follow best practices, are the parents. They will be serviced based on our Head Start Vision, For every child and every family the best Head Start services every day and by benchmark due dates!

- 11) Add Goal Resources/Referrals given to family in ChildPlus. Note *Scheduled Date* was added to assist in using the ChildPlus *To Do List* Case Management tool.

Add Family Goal

Initial Date: 9/25/19
 Description: 2019-2020
 Service Area: Goal 1: Family Life Practice
 Issue: Family Routines
 Family Outcome: Families as Lifelong Educators
 Case Worker: Farias-Ybarra, Cassandra
 Progress: In Progress
 Date Closed:
 Result:
 Event Notes: 9/25/2019 12:46 PM Elvia Pace Management Analyst Management Analyst
 Timeline: 09/2019, 10/2019, 11/2019, 12/2019, 03/2020
 <end of entry>

Actions

Scheduled	Action Date	Action Type	Description	Status	Case Worker	Referred To	Time
12/1/2019	9/25/2019	Referral	Volunteer Application	Ongoing	Farias-Ybarra, ...	STAFFORD HEA...	0h 0m
10/15/2019	9/25/2019	Referral	Parenting Class	Ongoing	Farias-Ybarra, ...	MAUC	0h 0m
9/30/2019	9/25/2019	Direct	Routine Handouts	Action Complet...	Farias-Ybarra, ...	STAFFORD HEA...	0h 0m

Save and Add Another Save Cancel Add

Reminder: Goal Referral versus Goal Resource: A Goal referral is given when you are directing a parent to a specific organization or a specific person. A Goal Resource is given to assist the parent but it is not specific to a person or place. Below are sample resources that may be given to assist in goals:

- Family Routine Logs
- Reading Logs
- Bedtime Routine Handouts
- Positive Word Handout
- 40 Developmental Assets
- Milestones
- 101 Things to do Handout
- Our Kids Magazine
- Flyer for Upcoming Community Events

Individual Add Action Entries

Routine Handouts

Direct - 9/25/19

Action Type: Direct
 Scheduled: 9/30/19
 Action Date: 9/25/19
 Type of Contact: Face-to-Face Meeting
 Description: Routine Handouts
 Status: Action Completed
 Case Worker: Farias-Ybarra, Cassandra
 Total Time: 0 Hours 0 Minutes
 Action Notes: 9/25/2019 1:15 PM Elvia Pace Management Analyst Management Analyst
 Routine Handouts were given as a resource to mom to give her an idea of what type of chart would work best with her children.
 <end of entry>

Delete Action Save Cancel

Parenting Class

Referral - 9/25/19

Action Type: Referral
 Scheduled: 10/15/19
 Action Date: 9/25/19
 Referred To: MAUC
 Referral Type: Verbal

Type of Contact: Face-to-Face Meeting
 Description: Parenting Class
 Status: Ongoing
 Case Worker: Farias-Ybarra, Cassandra
 Total Time: 0 Hours 0 Minutes

Action Notes: 10/25/2019 1:19 PM Elvia Pace Management Analyst Management Analyst Mom was given referral and October Calendar listing the day that the MAUC Parenting Class will start at Stafford. FSW explained to mom that the classes were 8 sessions and encouraged her to attend all of them. Mom said she would talk to her boss to work with her schedule so she can attend as many as she can.

Delete Action Save Cancel

Parent Volunteer Application

Referral - 9/25/19

Action Type: Referral
 Scheduled: 12/1/19
 Action Date: 9/25/19
 Referred To: STAFFORD HEAD START
 Referral Type: Verbal

Type of Contact: Face-to-Face Meeting
 Description: Volunteer Application
 Status: Ongoing
 Case Worker: Farias-Ybarra, Cassandra
 Total Time: 0 Hours 0 Minutes

Action Notes: 9/25/2019 1:24 PM Elvia Pace Management Analyst Management Analyst Mom used laptop in the TLC room to fill out an EISD online parent volunteer application. FSW explained to mom that EISD HR would contact her if application was accepted or if FSW heard anything first she would call mom.

Delete Action Save Cancel

12) Attachments: *Family Goal Form* attached using Scan and Attach Guide.

Family Goal Setting Resource
Family Life Practices

FLP1a

GOAL:
Family Routines
 To establish regular family routines that promote positive child development

Objectives for achieving outcome goal:

- Step 1 Identify activities that reinforce a successful daily routine
- Step 2 Develop and implement a dinner time routine with family
- Step 3 Develop and implement a wake up and bedtime routine
- Step 4 Develop a routine for daily hygiene, dressing and self-care
- Step 5 Maintain daily routines for three month period
- Other objectives, strategies or action steps:

- attend Parent classes on campus (8 sessions) 10/1/2019
- Apply to be a Parent Volunteer 12/1/2019

Timeline:
 09/1/2019
 10/1/2019
 11/1/2019
 12/1/2019
 03/30/2020

Community Resources available to help you achieve goals:

Organization: Headstart	Address: Rontue charts	Resources Given
Contact Name: FSW Elvia Pace	Phone: given	
Organization: MAUC	Address: Stafford HS	Referral Given
Contact Name: FSW Elvia Pace	Phone: Parenting Class on campus	Referral Given
Organization: Stafford Head Start	Address: online volunteer app	Referral Given
Contact Name: FSW Elvia Pace	Phone: 210 444-7900	

Benchmarks to Accomplishing Goal
 (These steps let you know where you are towards achieving your goal)

No steps taken	Follow family routines 50% of time	Follow family routines 75% of time	Consistently maintain daily routines for at least 3 months
1	2	3	4

Partnership Agreement: We agree that we will work together to achieve this goal.

Signature of Parent/Guardian: *Elvia Pace* Date: 09/25/19
 Signature of Head Start Staff: *[Signature]* Date: 09/25/19

© Shine Early Learning All Rights Reserved. Uses are subject to the limitations set forth in your user agreement.

13) Attachments: Referrals attached using Scan and Attach Guide

Family & Community Support Documents			
Source Document	Service Area	Attachment Type	Description
Parent Handbook	Family Services	Family Partnership Agreement	2020-2021
Family Goal	Family Services	Goal Setting	2020-2021
Referrals to any agency	Family Services	Goal Referral or Need Referral	2020-2021



ChildPlus View

Application Enrollment Family Services Health Immunizations Disability Transportation Education Attendance PIR							
Events Family Outcomes Family Services Information Attachments (3) BOY Wellness Assessment EOY Wellness Assessment							
Family Services							
Add Attachment Edit Details View Delete							
	Service Area	Attachment Type	Description	Date Added	Added By	File Name	Size
	Family Services	Goal Setting/Strengths Survey	2019-2020	6/20/2019	Pace, Elvia	CBrady Goal ...	254,659
	Family Services	Goal Referral	2019-2020	6/20/2019	Pace, Elvia	CBrady Goal ...	217,745
	Family Services	Goal Referral	2019-2020	6/20/2019	Pace, Elvia	CBrady Goal ...	200,340



Parent Volunteer App

Community Referral Form

Parent/Guardian Name(s): Carla Brady Child Plus ID: 259121

Services Requested (Specify): <input type="checkbox"/> Emergency/Crisis Assistance <input type="checkbox"/> Food <input type="checkbox"/> Housing/Utility Assistance <input type="checkbox"/> Clothing <input type="checkbox"/> Transportation <input type="checkbox"/> Special Education <input type="checkbox"/> Recreational Activities <input type="checkbox"/> Child Support / Child Care Assistance <input type="checkbox"/> Immigration, legal assistance	Education / Career <input type="checkbox"/> Literacy or Education <input type="checkbox"/> Financial Literacy <input checked="" type="checkbox"/> Parenting Education <input type="checkbox"/> Adult Education <input type="checkbox"/> Job Training / Career Counseling Health <input type="checkbox"/> Health / Nutrition Education <input type="checkbox"/> Medical / Dental Home <input type="checkbox"/> Vision / Hearing	Mental / Family Wellness <input type="checkbox"/> Marriage and Family Therapy <input type="checkbox"/> Domestic Family Violence Services <input type="checkbox"/> Parent Support Group <input type="checkbox"/> Coping with Loss / Bereavement Counseling <input type="checkbox"/> Assistance to Families of Incarcerated <input type="checkbox"/> Anger / Stress Management <input type="checkbox"/> Substance Abuse Prevention/Treatment <input type="checkbox"/> Child Abuse or Neglect Services <input type="checkbox"/> Dealing with Traumatic Situation
--	---	---

Reason for Referral:
Assistance with Goal Completion - EISD Online Parent Volunteer App HRK aduse on status

1. Agency or Contact Person (If Applicable): EISD HR
 Address: ISW online application @ Staffed
 Phone Number: 202-200-1041 Hours of Operation: 745-430p

2. Agency or Contact Person (If Applicable):
 Address:
 Phone Number: Hours of Operation:

3. Agency or Contact Person (If Applicable):
 Address:
 Phone Number: Hours of Operation:

Parent Name (Please Print): Carla Brady Phone Number: 202-200-1041 Date: 09/25/19
 Family Support Staff (Please Print): Elvia Pace Phone Number: 202-200-1041 Date: 09/25/19

Original - Parent
 Yellow - Child File

Parenting Class

Community Referral Form

Parent/Guardian Name(s): Carla Brady Child Plus ID: 259121

Services Requested (Specify): <input type="checkbox"/> Emergency/Crisis Assistance <input type="checkbox"/> Food <input type="checkbox"/> Housing/Utility Assistance <input type="checkbox"/> Clothing <input type="checkbox"/> Transportation <input type="checkbox"/> Special Education <input type="checkbox"/> Recreational Activities <input type="checkbox"/> Child Support / Child Care Assistance <input type="checkbox"/> Immigration, legal assistance	Education / Career <input type="checkbox"/> Literacy or Education <input type="checkbox"/> Financial Literacy <input checked="" type="checkbox"/> Parenting Education <input type="checkbox"/> Adult Education <input type="checkbox"/> Job Training / Career Counseling Health <input type="checkbox"/> Health / Nutrition Education <input type="checkbox"/> Medical / Dental Home <input type="checkbox"/> Vision / Hearing	Mental / Family Wellness <input type="checkbox"/> Marriage and Family Therapy <input type="checkbox"/> Domestic Family Violence Services <input type="checkbox"/> Parent Support Group <input type="checkbox"/> Coping with Loss / Bereavement Counseling <input type="checkbox"/> Assistance to Families of Incarcerated <input type="checkbox"/> Anger / Stress Management <input type="checkbox"/> Substance Abuse Prevention/Treatment <input type="checkbox"/> Child Abuse or Neglect Services <input type="checkbox"/> Dealing with Traumatic Situation
--	---	---

Reason for Referral:
Parent interested in Parenting Classes to assist in Family Routine Goal Completion

1. Agency or Contact Person (If Applicable): MAUC
 Address: Offering classes on Staffed Campus
 Phone Number: ISW 202-200-1041 Hours of Operation: Tuesdays 8AM-10AM

2. Agency or Contact Person (If Applicable):
 Address:
 Phone Number: Hours of Operation:

3. Agency or Contact Person (If Applicable):
 Address:
 Phone Number: Hours of Operation:

Parent Name (Please Print): Carla Brady Phone Number: 202-123-4567 Date: 09/25/19
 Family Support Staff (Please Print): Elvia Pace Phone Number: 202-456-7401 Date: 09/25/19

Original - Parent
 Yellow - Child File

Event: Non Participation in the Family Goal Setting

- 1) Click *Add Event* in the *Family Services* Area in the *Events* Tab. Then click *Family Goal*. (Note at time of print screen creation for the ChildPlus Data Entry Guide EHS still needed *Family Goal* Events for Family Life Practice, Family Self Sufficiency, Support for Children and Support for Families to still be accessed.)

The screenshot shows the 'Family Services' area with the 'Events' tab selected. A table lists various events with columns for Date, Event, Description, Associated With, and Progress. A yellow arrow points to the 'Add Event' button in the top right corner. Another yellow arrow points to the 'Family Goal' option in the 'Add Family Service Event' dropdown menu.

Date	Event	Description	Associated With	Progress
10/21/19	Need Identified	Food and Uniforms	Family	Complete
10/07/19	RFA-Mental Health	2019-2020	Family	Complete
9/25/19	Family Goal	2019-2020	Family	Complete
9/25/19	Family Goal	2019-2020	Family	Complete
9/05/19	Need Identified	Utility Assistance	Family	In Progress
8/27/19	Routine Contact	2019-2020	Family	In Progress
6/17/19	Family Goal	2019-2020	Family	In Progress
5/09/19	Family Meeting/Home Visit	2019-2020	Family	In Progress
7/02/18	Attendance	Promoting Good Attendance	Family	Complete
6/13/18	Need Identified	SafeCare	Family	In Progress
6/04/18	RFA-Mental Health	2018-2019	Family	In Progress
4/18/18	Routine Contact	17-18 Routine Contact	Family	In Progress
11/09/17	Family Partnership Agree...	2017-2018	Family	Complete
9/15/17	Need Identified	Uniform	Family	Complete
6/30/15	Communication Log		Peter	Complete

- 2) Initial Date: Date Goal Process was introduced
- 3) Description: 2020-2021
- 4) Service Area: No Goal

The screenshot shows the 'Add Family Goal' form. A yellow arrow points to the 'Initial Date' field, which is set to 9/25/19. Another yellow arrow points to the 'Description' field, which is set to 2019-2020. A third yellow arrow points to the 'Service Area' dropdown menu, which is set to 'Goal 7: No Goal'.

Field	Value
Initial Date	9/25/19
Description	2019-2020
Service Area	Goal 7: No Goal
Issue	
Family Outcome	
Case Worker	Farias-Ybarra, Cassandra
Progress	
Date Closed	
Result	

Reminder: A family can change their mind at any time and decide they would like to participate in the *Family Goal* Setting process. Whether it be during timeline follow up check-ins or any other time during the year. If this occurs a new Family Goal Event should be made. Follow process for the *Family Goal* Setting (Yes) event.

5) Case Worker: Enter Your Name

6) Progress: Completed

Add Family Goal

Initial Date: 9/25/19
Description: 2019-2020
Service Area: Goal 7: No Goal
Issue:
Family Outcome:
Case Worker: Farias-Ybarra, Cassandra
Progress: Completed
Date Closed:
Result:
Yellow arrows point to the Case Worker and Progress fields.

7) Date Closed: Same date as introduced

8) Result: Not met- Parent Problem

Add Family Goal

Initial Date: 9/25/19
Description: 2019-2020
Service Area: Goal 7: No Goal
Issue:
Family Outcome:
Case Worker: Farias-Ybarra, Cassandra
Progress: Completed
Date Closed: 9/25/19
Result: Not Met - Parent Problem
Yellow arrows point to the Date Closed and Result fields.

9) Event Notes: Indicate Timeline for follow up in the Event Notes. **Remember to Time stamp your Event Notes** by selecting the clock icon.

Family Goal

Initial Date: 9/25/19
Description: 2019-2020
Service Area: Goal 7: No Goal
Issue:
Family Outcome:
Case Worker: Farias-Ybarra, Cassandra
Progress: Completed
Date Closed: 9/25/19
Result: Not Met - Parent Problem
Event Notes: 6/20/2019 3:10 PM Elvia Pace Management Analyst Management Analyst
Timeline: 12/19, 03/20, 05/20
<end of entry>
Yellow arrow points to the clock icon in the Event Notes section.

Reminder: When a family decides not to set a goal, the event is still entered into ChildPlus. Using the same *Add Action* process Quarterly (3 months) follow up **MUST** be documented showing efforts made to work with the family and stay in accordance with Head Start Standards and Policies.

Event: Family Goal Setting Follow Up

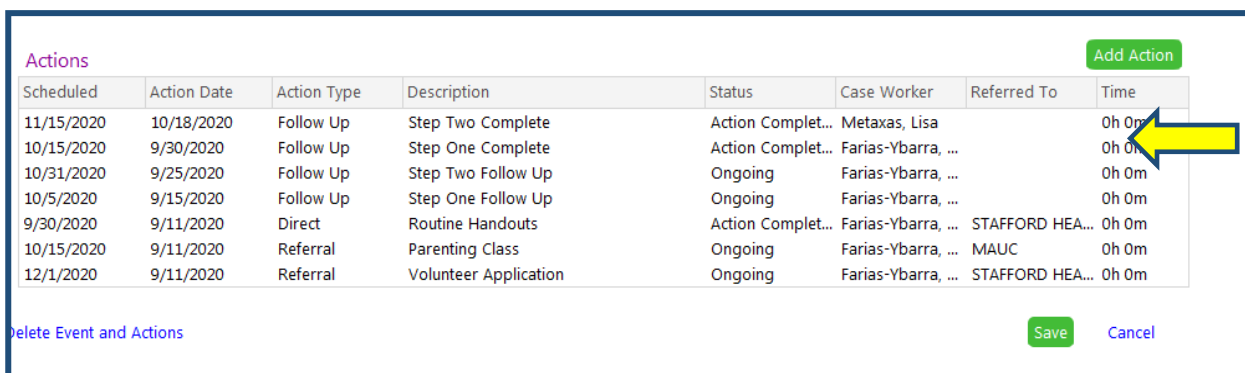
If a referral form is issued to assist in completion of the goal, please follow referral instructions:

Timelines on the goal form indicate when you will follow up with the parent. If a parent shares a status update before the timeline date on the form, enter that information. To document follow-ups, an action note must be completed giving some detail about the status of the step. If the step has been completed, indicate this by selecting the *Status*: Action Completed, otherwise select the appropriate status that applies.

Notes stating “Left Voicemail” for parent or “Sent Resources” DOES NOT QUALIFY as a follow-up. Resources can be sent out to assist the family to accomplish their goals; however, the follow-up must be a report from the parent as to how the family is doing with the goal. Follow-up is used to obtain a report on the progress the family has made with their goal.

Goal follow-up is determined by the timeline set at the *Family Goal* meeting with the family. When documenting continued follow-up notes, return to the Goal Event. You will select *Add Action* every time you follow up with the family with the same process as a *Need Identified Follow-Up Event*. Be specific regarding the step. If you receive a follow-up for several steps at one time, you can add them in one *Add Action*, but label the action accordingly. For example, all follow-up notes for Steps 3 & 4 will be under one action. You will Time Stamp the entry and enter your follow-up notes. Follow up with the family per the Timeline set until the goal is completed or until end of year closeout.

ChildPlus View of *Add Action* Follow up Notes



Actions Add Action

Scheduled	Action Date	Action Type	Description	Status	Case Worker	Referred To	Time
11/15/2020	10/18/2020	Follow Up	Step Two Complete	Action Complet...	Metaxas, Lisa		0h 0m
10/15/2020	9/30/2020	Follow Up	Step One Complete	Action Complet...	Farias-Ybarra, ...		0h 0m
10/31/2020	9/25/2020	Follow Up	Step Two Follow Up	Ongoing	Farias-Ybarra, ...		0h 0m
10/5/2020	9/15/2020	Follow Up	Step One Follow Up	Ongoing	Farias-Ybarra, ...		0h 0m
9/30/2020	9/11/2020	Direct	Routine Handouts	Action Complet...	Farias-Ybarra, ...	STAFFORD HEA...	0h 0m
10/15/2020	9/11/2020	Referral	Parenting Class	Ongoing	Farias-Ybarra, ...	MAUC	0h 0m
12/1/2020	9/11/2020	Referral	Volunteer Application	Ongoing	Farias-Ybarra, ...	STAFFORD HEA...	0h 0m

[Delete Event and Actions](#) Save Cancel

Example of *Goal Follow Up* notes for Reading with your child. **Remember to Time stamp your Event Notes** by selecting the clock icon.

Step 1

9/20/2018 2:30 PM Rosio Plata Family Support Worker

FSW shared with parent "The Little Read Wagon" schedule from the near San Antonio Public Library. Parent stated she will attend the workshop on October 13. In addition FSW gave and explained parent the flyer "5 Top Tips To Encourage Reading". <end of entry>

Family Goal: Family Life Practice

Initial Date: 9/6/18
Description: Reading at Home with Child
Associated With: Entire Family
Case Worker: Plata, Rosio

Follow Up - 9/20/18

Action Type: Follow Up
Scheduled: ☐
Action Date: 9/20/18

Type of Contact: Face-to-Face Meeting
Description: STEP 1
Status: Action Completed
Case Worker: Plata, Rosio
Total Time: 0 Hours 0 Minutes

Action Notes: 9/20/2018 2:30 PM Rosio Plata Family Support Worker: FSW shared with parent: "The Little Read Wagon" schedule from the near San Antonio Public Library. Parent stated she will attend the workshop on October 13. In addition FSW gave and explained parent the flyer "5 Top Tips To Encourage Reading"

Delete Action

Save Cancel

Step 2

10/04/2018 2:12 PM Rosio Plata Family Support Worker

FSW reminded parent about the upcoming workshop at SAPL and FSW explained to parent how to get a Library Card. FSW provided the Library Card Registration to parent and explained to parent the process and how to check out children's books. In addition FSW gave and explained to parent the flyer "Tips for Parents of Preschoolers". Parent stated: ... <end of entry>

Family Goal: Family Life Practice

Initial Date: 9/6/18
Description: Reading at Home with Child
Associated With: Entire Family
Case Worker: Plata, Rosio

Follow Up - 10/4/18

Action Type: Follow Up
Scheduled: ☐
Action Date: 10/4/18

Type of Contact: Face-to-Face Meeting
Description: STEP 2
Status: Action Completed
Case Worker: Plata, Rosio
Total Time: 0 Hours 0 Minutes

Action Notes: 10/04/2018 2:12 PM Rosio Plata Family Support Worker: FSW reminded parent about the upcoming workshop at SAPL and FSW explained parent how to get a Library Card. FSW provided the Library Card Registration to parent and explained parent the process and how to check out children's books. In addition FSW gave and explained parent the flyer "Tips for parents of Preschoolers"

Delete Action

Save Cancel

11/2/2018 Follow Up STEP 3 & 4 Action Complet... Plata, Rosio 0h 0m
10/4/2018 Follow Up STEP 2 Action Complet... Plata, Rosio 0h 0m
9/20/2018 Follow Up STEP 1 Action Complet... Plata, Rosio 0h 0m

Delete Event and Actions

Save Cancel

Event: Participation in Family Goal Setting Completion/Close out

A family does not have to follow the timeline. The timeline is merely a guide. A family may finish their goal before the set timeline. In that same token they may not finish the goal before the end of the year. If the family has not completed their goal, the event will still need to be closed. This is a good opportunity to praise the family for the work that they have done during the year towards their goal. You may also provide additional resources at this time so the family may continue working on their goal during the summer.

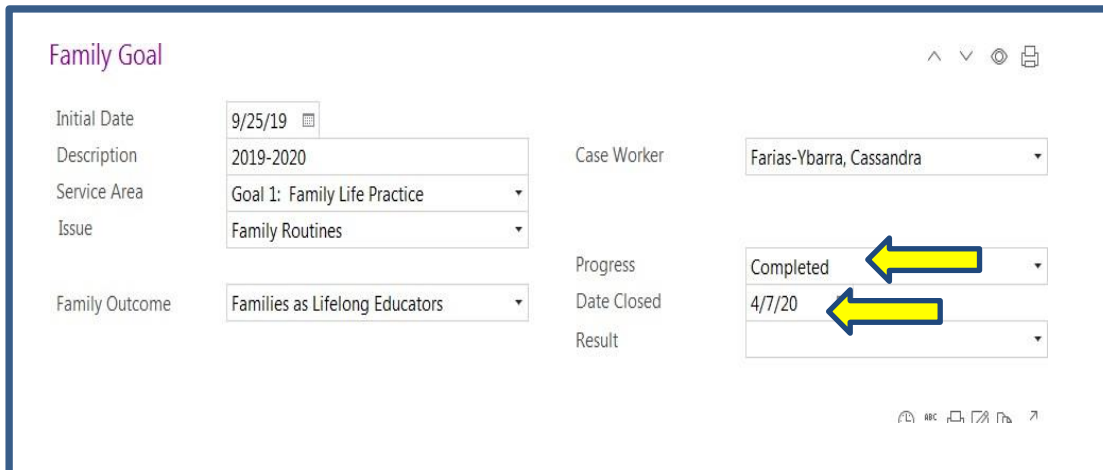
The *Family Goal* is parent driven and a family may lose interest or change their goal as their family changes. We are to be flexible and through our follow up with the family monthly, even if not stated on the timeline, can assist us in staying in sync with the family.

Closing a Goal process is the same as all other events. There are certain fields that must be completed.

1) Progress: Completed

All family goals must end the year with **COMPLETED** for the progress status.

2) Date Closed: Parent Driven (When Parent reaches goal or date of last day of school)



The screenshot shows a 'Family Goal' form with the following fields and values:

Field	Value
Initial Date	9/25/19
Description	2019-2020
Service Area	Goal 1: Family Life Practice
Issue	Family Routines
Family Outcome	Families as Lifelong Educators
Case Worker	Farias-Ybarra, Cassandra
Progress	Completed
Date Closed	4/7/20
Result	

Two yellow arrows point to the 'Completed' value in the Progress field and the '4/7/20' value in the Date Closed field, indicating these are required for closing the goal.

3) Result: The status of the Goal at completion

Met: Fully or Partially- How much did the parent complete to obtain their goal

Not Met: Agency Problem- COSA failed to follow process which affected parent. *Examples:* Resources not given, no follow up or poor case management

Not Met: Parent Problem: Parent failed to follow process which affected their completion. Documentation shows referrals/resources given and follow ups was provided to the parent; however had circumstances that prevented them from working on their goal. *Examples:* Resources were given but parent did not follow through, Parent moved school outside of COSA limits, parent interested in another goal, Family Emergency/ Situation that prevented them from completing goal

Family Goal

Initial Date: 9/25/19

Description: 2019-2020

Service Area: Goal 1: Family Life Practice

Issue: Family Routines

Family Outcome: Families as Lifelong Educators

Case Worker: Farias-Ybarra, Cassandra

Progress: Completed

Date Closed: 4/7/20

Result:
Met Fully
Met Partially
Not Met - Agency Problem
Not Met - Parent Problem

Event Notes: 9/25/2019 12:46 PM Elvia Pace Management Analyst Management Anal
Timeline: 09/2019, 10/2019, 11/2019, 12/2019, 03/2020
<end of entry>

Best Practice: Close out Goal Setting Event as it happens. It is not due until the end of the school year but doing it along the way allows you get ahead of data entry at the end of the school year.

Event: Non Participation in Family Setting Completion/Close out

Family Goals are parent driven and the family may already be working with another agency or is simply not ready to commit to work on a goal. The No Goal Completion would then be entered similar to *Family Goal* Event.

1) Progress: Not Applicable

The exception to a *Family Goal* Completed Progress will be if the family never participated in the goal setting process and a No Goal event was created. Then the progress will be Not Applicable.

2) Date Closed: Last day Goal was offered based upon No Goal Follow Up Timeline

The screenshot shows the 'Family Goal' form with the following fields and values:

- Initial Date: 9/25/19
- Description: 2019-2020
- Service Area: Goal 7: No Goal
- Issue: (empty)
- Family Outcome: (empty)
- Case Worker: Farias-Ybarra, Cassandra
- Progress: Not Applicable
- Date Closed: 9/25/19
- Result: (empty)

Yellow arrows point to the 'Progress' and 'Date Closed' fields.

3) Result: Not Met: Parent Problem: Parent failed to follow process which affected their completion. There should be follow up documentation that the family was offered the goal every three months.

The screenshot shows the 'Family Goal' form with the following fields and values:

- Initial Date: 9/25/19
- Description: 2019-2020
- Service Area: Goal 7: No Goal
- Issue: (empty)
- Family Outcome: (empty)
- Case Worker: Farias-Ybarra, Cassandra
- Progress: Not Applicable
- Date Closed: 9/25/19
- Result: Not Met - Parent Problem

Event Notes: 6/20/2019 3:10 PM Elvia Pace Management Analyst Management Analyst
Timeline: 12/19, 03/20, 05/20
<end of entry>

Actions Table:

Scheduled	Action Date	Action Type	Description	Status	Case Worker	Referred To	Time
5/30/2020	3/26/2020	Follow Up	No Goal Follow Up	Action Complet...	Farias-Ybarra, ...		0h 0m
3/30/2020	12/10/2019	Follow Up	No Goal Follow Up	Action Complet...	Farias-Ybarra, ...		0h 0m

Yellow arrows point to the 'Result' field and the 'Actions' table.

Event: Need Identified

Create this event as the family needs are identified. Documentation of the need will start in the *Events* Tab in the *Family Services* area. A family may return later in the year with an additional need. Create an event with each need identified. A family may have multiple *Need Identified* events in a school year.

Peter *Brady's Family

Male DOB: 7/01/14 4y 11m CPID: 259121
New 6/18/19 • Year 1 (+1)

HEAD START 2019 - 2020 • San Antonio ISD • Arnold Elementary • < No Classroom > • Head Start.1

Application Enrollment Family Services Disability Transportation Education Attendance PIR

Events Family Services Information Attachments (0) BOY Wellness Assessment EOY Wellness Assessment

Family Services Events Options Add Event

- 1) Click on Add Event and indicate *Need Identified* event.

Application Enrollment Family Services Health Immunizations Disability Transportation Education Attendance PIR

Events Family Outcomes Family Services Information Attachments (4) Family Correspondence Intensive Case Management

Family Services Events Options Add Event

Date	Event	Description	Associated With	Progress
5/12/20	Routine Contact	check in/ parent phone call	Family	
5/12/20	Need Identified	Financial assistance	Family	In Progress
5/11/20	Need Identified	Exceptional Kids Resource	Family	Completed
5/11/20	Need Identified	Home learning activities	Family	Completed
5/11/20	Need Identified	Ready rosie parent/child activities	Family	Completed
5/04/20	Need Identified	Home Learning Activities	Family	Completed
5/04/20	Routine Contact	check in/ parent check in	Family	
5/04/20	Need Identified	Ready Rosie Parent Child Activities	Family	Completed
4/28/20	Routine Contact	check in/ parent phone call	Family	
4/28/20	Need Identified	Essentials day	Family	Completed
4/28/20	Need Identified	Ready rosie parent/child activities	Family	Completed
4/28/20	Need Identified	Home learning activities	Family	Completed
4/22/20	Need Identified	Home learning activities	Family	Completed

Add Family Service Event

- Attendance
- EHS-Child Care Services
- EHS-Transitions
- Family Goal
- Family Meeting/Home Visit
- Fatherhood Activity
- Home Visit
- Interest Identified
- Mental Wellness Services
- Need Identified**
- RFA-Mental Health
- Routine Contact

Cancel

- 2) Initial Date: Enter the date the actual event occurred
- 3) Description: List specific need identified
- 4) Source of Information: Where did the information come from?

Add Need Identified

Initial Date

Description

Source of Information

Associated With

Case Worker

Family Members

Closure Expected

Progress

Date Closed

Result

Entire Family

Metaxas, Lisa

- 5) Case Worker: Enter Your Name
- 6) Family Members: Family Member who bought the need to you
- 7) Closure Expected: Input the date that the event is expected to be closed (Ask yourself what is a reasonable amount of time in which the family's need will be met)
- 8) Progress: Status of the need event at the time of the parent check-in. This progress may change as you check in with the family member.

The screenshot shows the 'Add Need Identified' form. On the left, there are fields for 'Initial Date' (with a calendar icon), 'Description', and 'Source of Information' (a dropdown menu). On the right, there is a table-like structure with the following rows: 'Associated With' (dropdown menu), 'Case Worker' (text field), 'Family Members' (text field), 'Closure Expected' (with a calendar icon), 'Progress' (text field), 'Date Closed' (with a calendar icon), and 'Result' (dropdown menu). Yellow arrows point to the 'Associated With' dropdown (showing 'Entire Family'), the 'Case Worker' field (showing 'Metaxas, Lisa'), the 'Closure Expected' field, and the 'Progress' field.

Reminder: The following fields are not completed until after the event is completed (Date Closed and Result). The Progress field may change as you check in with the family. This will be covered in ***Need Identified Event Close*** section below.

- 9) Event Notes: ***Remember to Time stamp your Event Notes*** by selecting the clock icon. Notes will briefly explain the situation and what the needs are.

The screenshot shows the 'Event Notes' section. It includes a text area with a timestamp '9/5/2019 8:47 AM' and the user's name 'Elvia Pace Management Analyst Management Analyst'. The text in the area reads: 'Mom came to ask for utility assistance. She had missed a couple of days work because of her child was sick. <end of entry>'. A yellow arrow points to a clock icon in the top right corner of the text area, and another yellow arrow points to the text area itself.

Best Practice: Providing details of the conversation you had with the family member is not just for data entry purposes. The information gathered also helps you provide the best possible customer service to the parent.

- 10) Do not click save until you complete the ***Need Identified*** event and its components described below.

Event: Need Identified Referral (Add Action)

To assist in addressing the needs of the family, a *Community Resource Referral* Form is used. The form is a way to document the community resource information that has been provided to the family. There are two types of referrals that can be given to a family: Written and Verbal. **You will use a *Community Resource Referral* Form for every type of referral given.** Create this event as referrals are provided. A *Community Resource Referral* Form is NOT NEEDED for **internal** referrals, for example, referrals made to the Mental Health team or ISD resources received such as Togs for Tots, where services are identified by staff. However notes in ChildPlus are still required to identify services families received. **Referrals are given year round and are not only attached to the need identified events (also, Family Meeting Home Visit, BOY/EOY, Goal Setting, etc).**

- 1) Click *Add Action* to document the family's need.

Add Need Identified

Initial Date: 9/9/20
Description: Utility Assistance
Source of Information: Parent

Event Notes: 09/09/2020 10:25 AM Elvia Pace - Management Analyst. Management Analyst Mom indicated she needed assistance with utility assistance. <end of entry>

Actions

Scheduled	Action Date	Action Type	Description	Status	Case Worker	Referred To	Time
No actions have been entered associated with this event. Click "Add Action" above to add one.							

Add Action (circled in blue)

Save (circled in yellow with a yellow arrow pointing to it)

- 2) Action Type: Referral
- 3) Action Date: Date the event occurred

Add Action

Action Type: Referral
Scheduled: 9/5/19
Referred To: City Of San Antonio Utility Ast.
Referral Type: Written

Save (circled in yellow with a yellow arrow pointing to it)

- 4) Referred To: Community Partner is referred to
- 5) Referral Type: Written or Verbal (Verbal would refer to online applications or referrals)

Add Action

Action Type: Referral
Scheduled: 9/5/19
Referred To: City Of San Antonio Utility Ast.
Referral Type: Written

Save (circled in yellow with a yellow arrow pointing to it)

6) Type of Contact: How contact was made

7) Description: Need the family needs assistance with

Add Action

Action Type: Referral

Scheduled: [Calendar Icon]

Action Date: 9/5/19

Referred To: City Of San Antonio Utility Ast.

Referral Type: Written

Type of Contact: Face-to-Face Meeting

Description: Utility Assistance

Status: [Dropdown]

Case Worker: Farias-Ybarra, Cassandra

Total Time: 0 Hours 0 Minutes

8) Status: Referral Status (ex: if contact has not been made with organization status would be on going. If you gave parent a uniform the status would be closed)

9) Case Worker: Enter Your Name

Add Action

Action Type: Referral

Scheduled: [Calendar Icon]

Action Date: 9/5/19

Referred To: City Of San Antonio Utility Ast.

Referral Type: Written

Type of Contact: Face-to-Face Meeting

Description: Utility Assistance

Status: Ongoing

Case Worker: Farias-Ybarra, Cassandra

Total Time: 0 Hours 0 Minutes

10) Action Notes: **Remember to Time stamp your Event Notes** by selecting the clock icon. Notes will be entered to describe the referral.

11) Click Save.

Action Notes

9/5/2019 11:38 AM Elvia Pace Management Analyst Management Analyst
Referred mo to The COSA Emergency Assistance Division. Mom does not have a smart phone so FSW printed out application from COSA website and went over with mom what she would need to take when submitting the application to the Willie Velasquez Center.

Save and Add Another Save

12) Referral: Complete and scan in the referral for the need identified. Use the instructions given in the *Scanning documents to Attach in Child Place* section.

Family Meeting/Home Visit Documents			
Source Document	Service Area	Attachment Type	Description
Family Meeting/Home Visit Form	Family Services	Family Meeting/Home Visit	2020-2021
Metro Health Dental Evaluation and Fluoride Varnish – Teeth Form	Health	Consent Form	2020-2021 MH
Labs Screening General Consent	Health	Consent Form	2020-2021 UIW
Parent Handbook	Family Services	Family Partnership Agreement	2020-2021
Referrals to any agency	Family Services	Goal Referral or Need Referral	2020-2021

Best Practice: Always indicate the organization that you referred the parent to. If it was multiple organizations, each one would have a separate add action but you can use the same referral form. Only if the referral is for different request would you use a separate form (ex: Food Bank and Financial Empowerment Center).

One Service and One Agency

Community Referral Form

Parent/Guardian Name(s): Carol Brady Child Plus ID: 259121

Services Requested (Specify):	Education / Career	Mental / Family Wellness
<input type="checkbox"/> Emergency / Crisis Assistance	<input type="checkbox"/> Literacy or Education	<input type="checkbox"/> Marriage and Family Therapy
<input type="checkbox"/> Food	<input type="checkbox"/> Financial Literacy	<input type="checkbox"/> Domestic Family Violence Services
<input checked="" type="checkbox"/> Housing/Utility Assistance	<input type="checkbox"/> Parent Support Group	<input type="checkbox"/> Parent Support Group
<input type="checkbox"/> Clothing	<input type="checkbox"/> Coping with Loss / Bereavement Counseling	<input type="checkbox"/> Coping with Loss / Bereavement Counseling
<input type="checkbox"/> Transportation	<input type="checkbox"/> Assistance to Families of Incarcerated	<input type="checkbox"/> Assistance to Families of Incarcerated
<input type="checkbox"/> Special Education	<input type="checkbox"/> Anger / Stress Management	<input type="checkbox"/> Anger / Stress Management
<input type="checkbox"/> Recreational Activities	<input type="checkbox"/> Substance Abuse Prevention/Treatment	<input type="checkbox"/> Substance Abuse Prevention/Treatment
<input type="checkbox"/> Child Support / Child Care Assistance	<input type="checkbox"/> Child Abuse or Neglect Services	<input type="checkbox"/> Child Abuse or Neglect Services
<input type="checkbox"/> Immigration, legal assistance	<input type="checkbox"/> Vision / Hearing	<input type="checkbox"/> Dealing with Traumatic Situation

Reason for Referral:
Mom has had a sickle cell and had to miss work. Needs utility assistance. Printed application and went over needed items.

1. Agency or Contact Person (If Applicable): CSA Emergency Assistance Division
 Address: Willie Velasquez Center 1909 N. Zaragoza St.
 Phone Number: 210-267-7830 Hours of Operation: 7:45am - 4:30pm

2. Agency or Contact Person (If Applicable):
 Address: _____
 Phone Number: _____ Hours of Operation: _____

3. Agency or Contact Person (If Applicable):
 Address: _____
 Phone Number: _____ Hours of Operation: _____

Parent Name (Please Print): Carol Brady Phone Number: 210-133-4567 Date: 09/05/19
 Family Support Staff (Please Print): Elvia Pace Phone Number: 210-266-1041 Date: 09/05/19

Original - Parent
 Yellow - Child File

One Service and Two Agencies

Community Referral Form

Parent/Guardian Name(s): Carol Brady Child Plus ID: 259121

Services Requested (Specify):	Education / Career	Mental / Family Wellness
<input type="checkbox"/> Emergency / Crisis Assistance	<input type="checkbox"/> Literacy or Education	<input type="checkbox"/> Marriage and Family Therapy
<input type="checkbox"/> Food	<input type="checkbox"/> Financial Literacy	<input type="checkbox"/> Domestic Family Violence Services
<input checked="" type="checkbox"/> Housing/Utility Assistance	<input type="checkbox"/> Parent Support Group	<input type="checkbox"/> Parent Support Group
<input type="checkbox"/> Clothing	<input type="checkbox"/> Coping with Loss / Bereavement Counseling	<input type="checkbox"/> Coping with Loss / Bereavement Counseling
<input type="checkbox"/> Transportation	<input type="checkbox"/> Assistance to Families of Incarcerated	<input type="checkbox"/> Assistance to Families of Incarcerated
<input type="checkbox"/> Special Education	<input type="checkbox"/> Anger / Stress Management	<input type="checkbox"/> Anger / Stress Management
<input type="checkbox"/> Recreational Activities	<input type="checkbox"/> Substance Abuse Prevention/Treatment	<input type="checkbox"/> Substance Abuse Prevention/Treatment
<input type="checkbox"/> Child Support / Child Care Assistance	<input type="checkbox"/> Child Abuse or Neglect Services	<input type="checkbox"/> Child Abuse or Neglect Services
<input type="checkbox"/> Immigration, legal assistance	<input type="checkbox"/> Vision / Hearing	<input type="checkbox"/> Dealing with Traumatic Situation

Reason for Referral:
Mom has had a sickle cell and had to miss work. Needs utility assistance. Printed application and went over needed items.

1. Agency or Contact Person (If Applicable): CSA Emergency Assistance Division
 Address: Willie Velasquez Center 1909 N. Zaragoza St.
 Phone Number: 210-267-7830 Hours of Operation: 7:45am - 4:30pm

2. Agency or Contact Person (If Applicable): Boyle County Economic Comm Dev
 Address: 333 N. Pecos Suite 590
 Phone Number: 210-335-3444 Hours of Operation: 8:30am - 4pm

3. Agency or Contact Person (If Applicable):
 Address: _____
 Phone Number: _____ Hours of Operation: _____

Parent Name (Please Print): Carol Brady Phone Number: 210-133-4567 Date: 09/05/19
 Family Support Staff (Please Print): Elvia Pace Phone Number: 210-266-1041 Date: 09/05/19

Original - Parent
 Yellow - Child File

Two Services Two Agencies

Community Referral Form

Parent/Guardian Name(s): Carol Brady Child Plus ID: 259121

Services Requested (Specify):	Education / Career	Mental / Family Wellness
<input type="checkbox"/> Emergency / Crisis Assistance	<input type="checkbox"/> Literacy or Education	<input type="checkbox"/> Marriage and Family Therapy
<input checked="" type="checkbox"/> Food	<input type="checkbox"/> Financial Literacy	<input type="checkbox"/> Domestic Family Violence Services
<input type="checkbox"/> Housing/Utility Assistance	<input type="checkbox"/> Parent Support Group	<input type="checkbox"/> Parent Support Group
<input type="checkbox"/> Clothing	<input type="checkbox"/> Coping with Loss / Bereavement Counseling	<input type="checkbox"/> Coping with Loss / Bereavement Counseling
<input type="checkbox"/> Transportation	<input type="checkbox"/> Assistance to Families of Incarcerated	<input type="checkbox"/> Assistance to Families of Incarcerated
<input type="checkbox"/> Special Education	<input type="checkbox"/> Anger / Stress Management	<input type="checkbox"/> Anger / Stress Management
<input type="checkbox"/> Recreational Activities	<input type="checkbox"/> Substance Abuse Prevention/Treatment	<input type="checkbox"/> Substance Abuse Prevention/Treatment
<input type="checkbox"/> Child Support / Child Care Assistance	<input type="checkbox"/> Child Abuse or Neglect Services	<input type="checkbox"/> Child Abuse or Neglect Services
<input type="checkbox"/> Immigration, legal assistance	<input type="checkbox"/> Vision / Hearing	<input type="checkbox"/> Dealing with Traumatic Situation

Reason for Referral:
Mom would like food assistance - referred to San Antonio Food Bank thru referral

1. Agency or Contact Person (If Applicable): San Antonio Food Bank thru referral
 Address: 2800 Enrique M. Barrera Pkwy
 Phone Number: 210-597-3463 Hours of Operation: 8am-5pm

2. Agency or Contact Person (If Applicable):
 Address: _____
 Phone Number: _____ Hours of Operation: _____

3. Agency or Contact Person (If Applicable):
 Address: _____
 Phone Number: _____ Hours of Operation: _____

Parent Name (Please Print): Carol Brady Phone Number: 210-133-4567 Date: 09/05/19
 Family Support Staff (Please Print): Elvia Pace Phone Number: 210-266-1041 Date: 09/05/19

Original - Parent
 Yellow - Child File

Community Referral Form

Parent/Guardian Name(s): Carol Brady Child Plus ID: 259121

Services Requested (Specify):	Education / Career	Mental / Family Wellness
<input type="checkbox"/> Emergency / Crisis Assistance	<input type="checkbox"/> Literacy or Education	<input type="checkbox"/> Marriage and Family Therapy
<input type="checkbox"/> Food	<input type="checkbox"/> Financial Literacy	<input type="checkbox"/> Domestic Family Violence Services
<input checked="" type="checkbox"/> Housing/Utility Assistance	<input type="checkbox"/> Parent Support Group	<input type="checkbox"/> Parent Support Group
<input type="checkbox"/> Clothing	<input type="checkbox"/> Coping with Loss / Bereavement Counseling	<input type="checkbox"/> Coping with Loss / Bereavement Counseling
<input type="checkbox"/> Transportation	<input type="checkbox"/> Assistance to Families of Incarcerated	<input type="checkbox"/> Assistance to Families of Incarcerated
<input type="checkbox"/> Special Education	<input type="checkbox"/> Anger / Stress Management	<input type="checkbox"/> Anger / Stress Management
<input type="checkbox"/> Recreational Activities	<input type="checkbox"/> Substance Abuse Prevention/Treatment	<input type="checkbox"/> Substance Abuse Prevention/Treatment
<input type="checkbox"/> Child Support / Child Care Assistance	<input type="checkbox"/> Child Abuse or Neglect Services	<input type="checkbox"/> Child Abuse or Neglect Services
<input type="checkbox"/> Immigration, legal assistance	<input type="checkbox"/> Vision / Hearing	<input type="checkbox"/> Dealing with Traumatic Situation

Reason for Referral:
Mom is struggling to pay bills, would like financial literacy assistance

1. Agency or Contact Person (If Applicable): SARL learn - Baran Library
 Address: 2800 W. Commerce
 Phone Number: 210-267-9168 Hours of Operation: Sun-Mon closed T-F Sat 12-5p

2. Agency or Contact Person (If Applicable):
 Address: _____
 Phone Number: _____ Hours of Operation: _____

3. Agency or Contact Person (If Applicable):
 Address: _____
 Phone Number: _____ Hours of Operation: _____

Parent Name (Please Print): Carol Brady Phone Number: 210-133-4567 Date: 09/05/19
 Family Support Staff (Please Print): Elvia Pace Phone Number: 210-266-1041 Date: 09/05/19

Original - Parent
 Yellow - Child File

Event: Need Identified Follow Up

All referrals require a monthly follow-up until the need is met. When documenting continued follow-up notes, you will return to the event that requires follow-up. Every time you follow up on the need you will add an action monthly until the need is met.

Add Action instructions are the same as when you document a referral except the Referred To and Referral Type fields are not accessible.

Add Action

Action Type

Follow Up

Scheduled

9/10/19

Type of Contact

Center/Office/School Meeting

Description

Utility Follow Up

Status

Ongoing

Case Worker

Farias-Ybarra, Cassandra

Total Time

0 Hours 0 Minutes

Action Notes

9/10/2019 2:35 PM Elvia Pace Management Analyst Management Analyst

Saw mom at the Parent Committee Meeting this morning. She reported she was going to Willie Velasquez Center to drop off her application. I assisted mom in making a few copies. She asked if I could review to make sure she didn't forget anything. She told me she would let me know status as soon as she found out.

Save and Add Another

Save

Cancel Add

If there is more than one need for the *Need Identified* event you will follow the same process as before however you would label each need accordingly when entering monthly follow up notes.

Add Need Identified

Initial Date

10/21/19

Description

Food and Uniforms

Service Area

Issue

Source of Information

Parent

Family Outcome

Associated With

Entire Family

Case Worker

Farias-Ybarra, Cassandra

Family Members

Carol Brady

Closure Expected

11/4/19

Progress

In Progress

Date Closed

Result

Event Notes

10/21/2019 3:49 PM Elvia Pace Management Analyst Management Analyst

Mom came in after school and need food and uniform assistance.

<end of entry>

Actions

Scheduled	Action Date	Action Type	Description	Status	Case Worker	Referred To	Time
	10/28/2019	Follow Up	Food Follow Up	Action Complet...	Farias-Ybarra, ...		0h 0m
	10/23/2019	Follow Up	Food Follow Up	Ongoing	Farias-Ybarra, ...		0h 0m
	10/21/2019	Referral	Uniforms	Action Complet...	Farias-Ybarra, ...	STAFFORD HEA...	0h 0m
	10/21/2019	Referral	Food Assistance	Ongoing	Farias-Ybarra, ...	SA Food Bank	0h 0m

Save and Add Another

Save

Cancel Add

Event: Need Identified Completion/Close Out

If the family has received the services that they requested or the family no longer wants to pursue the need request an *Add Action* note is created to report the situation and outcome. The status of the *Add Action* (follow up of event) is documented in this note. The original *Need Identified* event will have additional fields that need to be filled out.

- 1) Progress: Status of the need event at the time of the parent check-in. This progress may change as you check in with the family member.
- 2) Date Closed: This field is not populated until the need is met or closed at the end of the year.
- 3) Result: Selected after the event has been closed due to need being met or at the end of the year.

Met: Fully or Partially- How much did the parent complete to obtain need met

Not Met: Agency Problem- COSA failed to follow process which affected parent. *Examples:* Resources not given, no follow up or poor case management

Not Met: Parent Problem: Parent failed to follow process which affected their completion. Documentation shows resources and follow ups were provided to the parent; however, the family did not seek out the resources or had other circumstances that prevented them from working on their goal. *Examples:* Resources were given but parent did not follow through, Parent interested in another goal, Family Emergency/ Situation that prevented them from completing goal.

- 4) Click Save.

The screenshot shows the 'Add Need Identified' form. The 'Result' dropdown is set to 'Met Fully'. The 'Date Closed' field is set to '10/28/19'. The 'Event Notes' section contains a note dated 10/21/2019. The 'Actions' table at the bottom lists several actions, including 'Follow Up' and 'Referral'. The 'Save' button is circled in red and highlighted with a yellow arrow.

Scheduled	Action Date	Action Type	Description	Status	Case Worker	Referred To	Time
	10/28/2019	Follow Up	Food Follow Up	Action Complet...	Farias-Ybarra, ...		0h 0m
	10/23/2019	Follow Up	Food Follow Up	Ongoing	Farias-Ybarra, ...		0h 0m
	10/21/2019	Referral	Uniforms	Action Complet...	Farias-Ybarra, ...	STAFFORD HEA...	0h 0m
	10/21/2019	Referral	Food Assistance	Ongoing	Farias-Ybarra, ...	SA Food Bank	0h 0m

Best Practice: Events should be closed as the events occur. This process is not mandatory since events do not need to be closed out until the end of the year. Closing events as they are completed is not only best practice but it allows you to work smarter and not harder!

Event: RFA Mental Health

The *RFA Mental Health* Event is created when there is a Mental Health concern for a child or a family.

- 1) Click Add Event in the *Family Services* Tab.

This screenshot shows the 'Family Services' tab selected for 'Peter *Brady's Family'. The 'Events' link in the left sidebar is highlighted with a yellow arrow. The 'Add Event' button in the top right corner is circled in green and also highlighted with a yellow arrow.

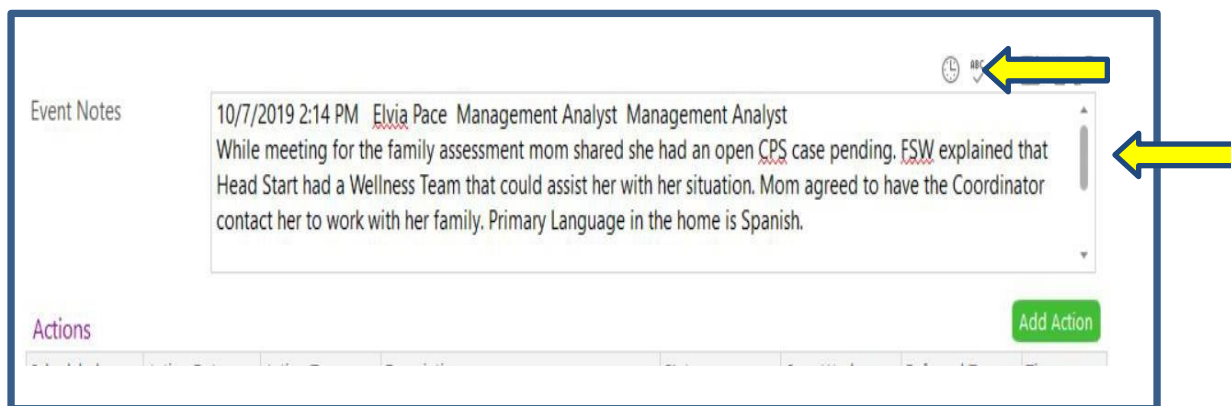
- 2) Select RFA- Mental Health

This screenshot shows the 'Add Family Service Event' dialog box. The 'Attendance' category is selected, and the 'RFA-Mental Health' option is highlighted with a yellow arrow. The 'Add Event' button in the top right corner is also visible.

- 3) Initial Date: Date RFA Event was created
- 4) Description: 2019-2020 (Current school year)
- 5) Case Worker: Enter your name here

This screenshot shows the 'Add RFA-Mental Health' form. The 'Initial Date' field is set to '10/7/19' and the 'Description' field is set to '2019-2020', both highlighted with yellow arrows. The 'Case Worker' field is set to 'Farias-Ybarra, Cassandra', also highlighted with a yellow arrow.

- 6) Event Notes: The events notes should detail the reason for the referral with the family or child concern. It will also indicate the primary language of the parent and if it has been explained to the family that the Mental Health Coordinator will be contacting them. Click Save after notes are entered. **Remember to Time stamp your Event Notes by selecting the clock icon.**



The screenshot shows a web form for entering event notes. On the left, there is a label 'Event Notes'. To its right is a text input area containing the following text: '10/7/2019 2:14 PM Elvia Pace Management Analyst Management Analyst While meeting for the family assessment mom shared she had an open CPS case pending. FSW explained that Head Start had a Wellness Team that could assist her with her situation. Mom agreed to have the Coordinator contact her to work with her family. Primary Language in the home is Spanish.' Above the text input area, there are two icons: a clock icon and a save icon. A yellow arrow points to the clock icon. Below the text input area, there is a green button labeled 'Add Action'. At the bottom of the form, there is a table with several columns and rows, but the content is mostly obscured. A yellow arrow points to the right side of the form area.

Reminder: Within 10 days, the Mental Health Coordinator will acknowledge receipt of the referral by changing the “Progress” drop- down to “In Progress.” Also, only Mental Health Team members will use the Action Item section.

A referral form is **NOT** needed for a request to the COSA Head Start Mental Health Team.

Event: CDA Event

This event is created for families that are working to obtain their CDA. FSWs do not have to enter anything in this event but will have access to see the notes and see the progress made by the parent. This event will be added by The Education Content Area.

Event: Routine Contact

This event is created for each family and used to document communication between the FSW and family as it happens. The communication should not fall within any of the other event descriptions, such as goal setting or referrals. This is where documentation for attempts to schedule family events such as Family Meeting/Home Visit, Family Goals or Family Meetings for Assessments should be documented.

- 1) In the Family Services Section Add Event.

Application Enrollment Family Services Events Disability Transportation Education Attendance PIR

Events Family Services Information Attachments (3) BOY Wellness Assessment EOY Wellness Assessment

Family Services Events Options Add Event

Date	Event	Description	Associated With	Progress	Time	Case Worker	Actions
------	-------	-------------	-----------------	----------	------	-------------	---------

- 2) Indicate Routine Contact

Progress Add Family Service Event Options Add Event

Complete	Complete	Complete	In Progress	In Progress	In Progress	Complete	In Progress	In Progress	Complete	Complete	Complete	
Attendance	EHS-Child Care Services	EHS-Transitions	Family Goal	Family Meeting/Home Visit	Fatherhood Activity	Home Visit	Interest Identified	Mental Wellness Services	Need Identified	Parent Activities	RFA-Mental Health	Routine Contact

- 3) Initial Date : Date first Contact was made
- 4) Description: 2019-2020 (Current School Year)
- 5) Case Worker: Enter Your Name

Add Routine Contact

Initial Date 8/27/19

Description 2019-2020

Associated With Entire Family

Case Worker Farias-Ybarra, Cassandra

- 6) Event Notes: Note should reflect it is for communication for school year. **Remember to Time stamp your Event Notes** by selecting the clock icon.
- 7) Add Action: You will document parent contact notes throughout the year by adding an action entry as it happens.

Event Notes

8/27/2019 12:02 PM Elvia Pace Management Analyst Management Analyst
This event is to document contact with family throughout the 2019-2020 school year.
<end of entry>

Actions

Scheduled	Action Date	Action Type	Description	Status	Case Worker	Referred To	Time
	10/16/2019	Direct	Issue with Teacher	Action Complet...	Farias-Ybarra, ...		0h 0m
	8/27/2019	Direct	Potty Training	Action Complet...	Farias-Ybarra, ...		0h 0m

Delete Event and Actions

Save Cancel

Routine Contact Example 1

Direct - 8/27/19

Action Type: Direct

Scheduled: ☐

Action Date: 8/27/19

Type of Contact: Face-to-Face Meeting

Description: Potty Training

Status: Action Completed

Case Worker: Farias-Ybarra, Cassandra

Total Time: 0 Hours 0 Minutes

Action Notes

8/27/2019 12:03 PM Elvia Pace Management Analyst Management Analyst
Met mom in the hallway to discuss bringing extra clothes for the child. He is not fully potty trained and needs extra clothes in case of an accident.
<end of entry>

Delete Action

Save Cancel

Routine Contact Example 2

Direct - 10/16/19

Action Type: Direct

Scheduled: ☐

Action Date: 10/16/19

Type of Contact: Phone

Description: Issue with Teacher

Status: Action Completed

Case Worker: Farias-Ybarra, Cassandra

Total Time: 0 Hours 0 Minutes

Action Notes

10/16/2019 12:06 PM Elvia Pace Management Analyst Management Analyst
Mom called FSW to discuss an issue with the teacher. FSW reminded mom that if she felt the Standards of Conduct were not being met as per the Parent Handbook she could ask to speak with the center director or principal. FSW will meet mom at the front desk tomorrow morning so she could assist in this process.

Delete Action

Save Cancel

Module: Family Correspondence

This module was specifically created due to the COVID 19 Pandemic in Spring of 2020. The Entry into this module is created each time a family contacted and information collected relates to assistance needed by the family due to the COVID 19 Pandemic. The communication between the FSW and family should be entered into the module as it happens. The communication should not fall within any of the other event descriptions, such as goal setting or referrals.

- 1) In the Family Services Section click on the Family Correspondence tab. Click on the Add Family Correspondence tab to add new entry.

Application Enrollment Family Services Health Immunizations Disability Transportation Education Attendance PIR

Events Family Outcomes Family Services Information Attachments (3) Family Correspondence Management Parent Handbook

Family Correspondence Print All Records Add Family Correspondence

Drag a column header here to group by that column

Record ID	Date of...	Child Name	# Children	# in Family	Family Physical Address	Phone
No records have been entered. Click "Add Family Correspondence" above to add one.						

- 2) Date of Assessment: Date contact was made with the family
- 3) Child Participant Name: Name of the child on your caseload. If sibling in the same program list both names.
- 4) Number of Children in the Household: Ask parent/guardian how many children are in the household. Due to COVID families may double up. Indicate all children in household at the present time.
- 5) Number of Adults Children in the Household: Ask parent/guardian how many adults are in the household. Due to COVID families may double up. Indicate all adults in household at the present time.

Family Correspondence Print Save Cancel Add

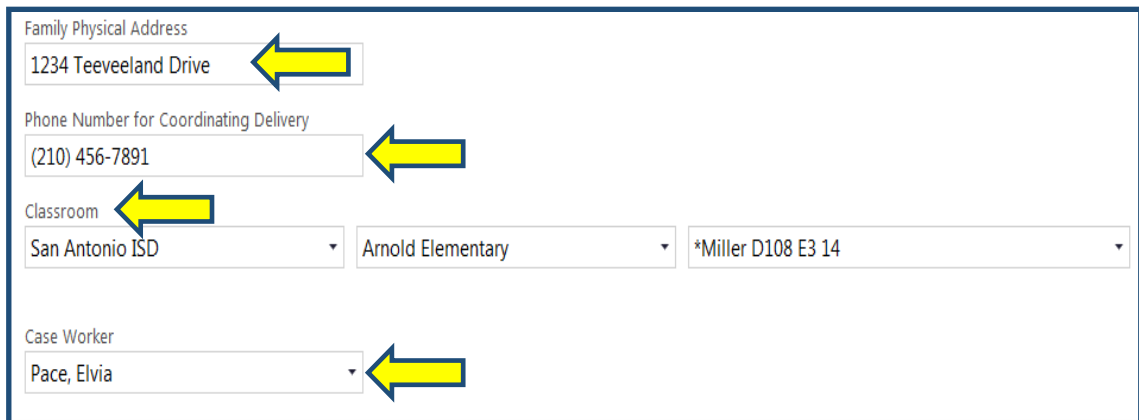
Date of Assessment 5/27/20

Child Participant Name Bobby/Cindy Brady

Number of Children in Household 6

Number of Adults in Household 2

- 6) Family Physical Address: Due to COVID families may double up. Indicate address where family is currently staying.
- 7) Phone Number for Coordinating Delivery: List current number where the family can be contacted.
- 8) Classroom: Indicate Agency, Site and Classroom of child listed is enrolled in.
- 9) Case Worker: Enter your name



Family Physical Address
1234 Teeveeland Drive

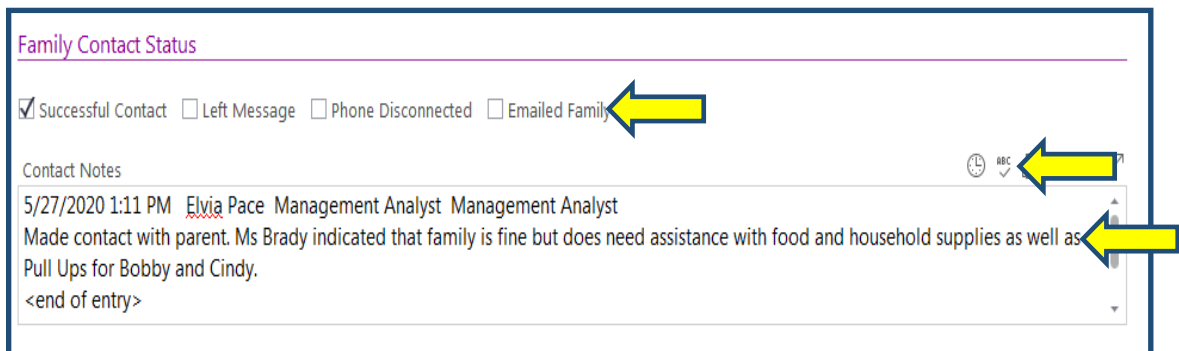
Phone Number for Coordinating Delivery
(210) 456-7891

Classroom
San Antonio ISD Arnold Elementary *Miller D108 E3 14

Case Worker
Pace, Elvia

Family Contact Status

- 10) Indicate Status of Contact
- 11) Contact Notes: Enter notes detailing communication with family. **Remember to Time stamp your Event Notes** by selecting the clock icon.



Family Contact Status

☒ Successful Contact ☐ Left Message ☐ Phone Disconnected ☐ Emailed Family

Contact Notes

5/27/2020 1:11 PM Elvia Pace Management Analyst Management Analyst
Made contact with parent. Ms Brady indicated that family is fine but does need assistance with food and household supplies as well as Pull Ups for Bobby and Cindy.
<end of entry>

COVID-19 Assessment

12) Has anyone in your family been to the doctor because of COVID-19 concerns?

13) Family Member

14) Has anyone in your home been diagnosed with COVID-19?

15) Family Member

COVID-19 Family Assessment

Has anyone in your family been to the doctor because of COVID-19 concerns?
 (Yellow arrow points to this dropdown)

Family Member
 (Yellow arrow points to this text box)

Has anyone in your family been diagnosed with COVID-19?
 (Yellow arrow points to this dropdown)

Family Member
 (Yellow arrow points to this text box)

General Need

16) Indicate need of family at time of the call. You will provide more detail below for each category.

General Need (Yellow arrow points to this header)

☒ Emergency/Crisis Intervention (Food, Clothing, Shelter) ☐ Education Material/Support ☐ Health Needs ☐ Mental Wellness Needs

☐ Community Collaboration

Emergency/Crisis Intervention

17) Indicate need family had at time of call. Select all that apply.

18) *If other Emergency etc. please indicate in the box below.* These are contact notes. **Remember to Time stamp your Event Notes** by selecting the clock icon. You may copy and paste from contact notes in Family Contact Status if notes are pertaining to this area.

Emergency/Crisis Intervention (Yellow arrow points to this header)

☐ Baby Formula ☒ Diapers ☒ Wipes ☒ Food for Household ☐ Emergency Housing ☐ Emergency Utility Services ☐ Clothing ☐ Food Insecurity

☒ Barriers to Transportation ☐ Other Emergency Etc.:

If other Emergency Etc. please indicate in box below: (Yellow arrow points to the clock icon)

5/27/2020 2:06 PM Elvia Pace Management Analyst Management Analyst
Made contact with family. Ms Brady indicated that family is fine but does need assistance with food and household supplies as well as Pull Ups for Bobby and Cindy. Mom would not be able to attend event as her vehicle is broken.
<end of entry>

Education/Material Support

19) Indicate need family had at time of call. Select all that apply.

20) *If other Education/Material Support please indicate in the box below.* These are contact notes. **Remember to Time stamp your Event Notes** by selecting the clock icon. You may copy and paste from contact notes in Family Contact Status if notes are pertaining to this area.

Education/Material Support

☐ Education/Special Education ☐ Adult Education ☒ Parenting Education

☒ Other Education/Material Support:

If other Education/Material Support please indicate in box below:

5/27/2020 2:10 PM Elvia Pace Management Analyst Management Analyst
Mom indicated that she was struggling with online learning for her children since they have been out of school. Mom would like parenting classes to help her better deal with her family being home together all the time because of COVID-19
<end of entry>

Health Needs

21) Indicate need family had at time of call. Select all that apply.

22) *If other Health Needs please indicate in the box below.* These are contact notes. **Remember to Time stamp your Event Notes** by selecting the clock icon. You may copy and paste from contact notes in Family Contact Status if notes are pertaining to this area.

Health Needs

☒ Medical/Dental ☐ Prescription Assistance/Medication

☐ Other Health Needs:

If other Health Needs please indicate in box below:

5/27/2020 3:40 PM Elvia Pace Management Analyst Management Analyst
Mom indicated she has not re-certified her Medicaid application. Mom was referred to SA Food Bank for assistance.
<end of entry>

Mental Wellness Needs

23) Indicate need family had at time of call. Select all that apply.

24) *If other Mental Wellness Needs please indicate in the box below.* These are contact notes. **Remember to Time stamp your Event Notes** by selecting the clock icon. You may copy and paste from contact notes in Family Contact Status if notes are pertaining to this area.

Mental Wellness Needs

☐ Child Abuse/Neglect Prevention or Response ☒ Coping Skills ☐ Counseling ☐ Grief/Loss ☐ Mental Health Head Start Child

☐ Mental Health Family ☐ Trauma-Related Issues

☐ Other Mental Health Needs:

If other please indicate in box below:

5/27/2020 3:42 PM Elvia Pace Management Analyst Management Analyst
Mom indicated she wanted support dealing with all her family in the same space all day. Mom wanted resources for parenting classes.
Please see RFA dated 05/27/20.
<end of entry>

Community Collaboration

25) Indicate need family had at time of call. Select all that apply.


26) *If other please indicate in the box below.* These are contact notes. **Remember to Time stamp your Event Notes** by selecting the clock icon. You may copy and paste from contact notes in Family Contact Status if notes are pertaining to this area.

Community Collaboration

☐ Child Care ☐ Finances/Budget ☒ Household Supplies ☐ Job Training/Job Seeking

☐ Other Community Collaboration:

If other please indicate in box below:

 5/27/2020 3:48 PM Elvia Pace Management Analyst Management Analyst Mom indicated she needed assistance with household cleaning supplies. Disinfectant wipes, bleach and hand sanitizer. <end of entry>

Service Area

27) Indicate need family had at time of call. Select all that apply.

Service Provided

☐ Follow Up ☒ Resource information Provided ☐ Resource Provided ☐ Referral Provided ☐ Intensive Case Management ☐ Left Message

☐ Mental Wellness Support ☒ Request For Assistance (RFA)

Supply Delivery Information

28) *Any Special Diets or Allergies? Adult or child?* Indicate any response from family.

Supply Delivery Information

Any Special Diets or Allergies? Adult or child?

None

The following section will monitor needs identified and the services that were received by family through resources provided by the community or Head Start. If need is indicated you will check the box. Check all that apply. Enter date when services are received by the family.

29) Food/Item Delivered and Food/Item Delivery Date

30) Baby Formula and Formula Delivery Date

31) Diapers and Diaper Delivery Date

32) Prescription and Prescription Delivery Date

☒ Food/Items Delivered
 Food/Item Delivery Date: 4/14/20
☐ Baby Formula
 Formula Delivery Date:
☒ Wipes
 Wipes Delivery Date:
☒ Diapers
 Diaper Delivery Date:
☐ Perscription
 Perscription Delivery Date:

Do not forget to click on **Save** once all information is entered in the Family Correspondence tab.

Family Correspondence Print Save

Event: Communication Log

The Communication Log is the only event in Childplus that is created by the system for each family when the child is selected/enrolled in the program. FSW does not need to document anything in this tab. ChildPlus documents text and email communication you have with the families automatically.

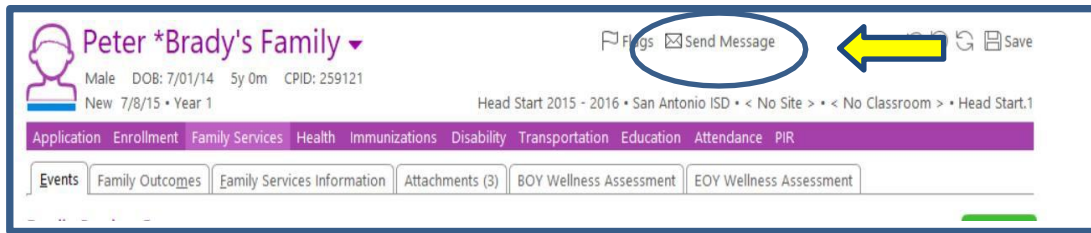
Initial Date: 2/10/18
 Description:
 Service Area:
 Issue:
 Source of Information:
 Family Outcome:
 Associated With:
 Case Worker: Angel Aguilera
 Family Members:
 Closure Expected:
 Progress:
 Date Closed:
 Result:

Event Notes:

Scheduled	Action Date	Action Type	Description	Status	Case Worker	Referred To	Time
	3/6/2019	Communication	2019 Recruitment Effort		Villalta, Virginia...		0h 0m
	9/12/2018	Communication	ASQ Text Spanish		Villalta, Virginia...		0h 0m
	8/8/2018	Communication	2018 Recruitment Effort		Villalta, Virginia...		0h 0m
	8/8/2018	Communication	2018 Recruitment Effort		Villalta, Virginia...		0h 0m
	5/29/2018	Communication	Recruitment Activity		Villalta, Virginia...		0h 0m
	5/29/2018	Communication	Recruitment Activity		Villalta, Virginia...		0h 0m

Delete Event and Actions Save Cancel

- 1) To send a message to the family click on the Send Message icon.



Peter *Brady's Family

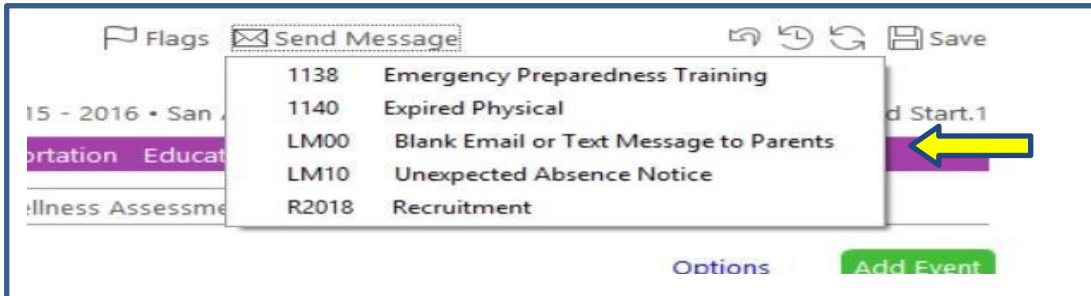
Male DOB: 7/01/14 5y 0m CPID: 259121
New 7/8/15 • Year 1

Head Start 2015 - 2016 • San Antonio ISD • < No Site > • < No Classroom > • Head Start.1

Application Enrollment Family Services Health Immunizations Disability Transportation Education Attendance PIR

Events Family Outcomes Family Services Information Attachments (3) BOY Wellness Assessment EOY Wellness Assessment

- 2) Select the reason for the contact



Flags Send Message Save

15 - 2016 • San Antonio ISD • < No Site > • < No Classroom > • Head Start.1

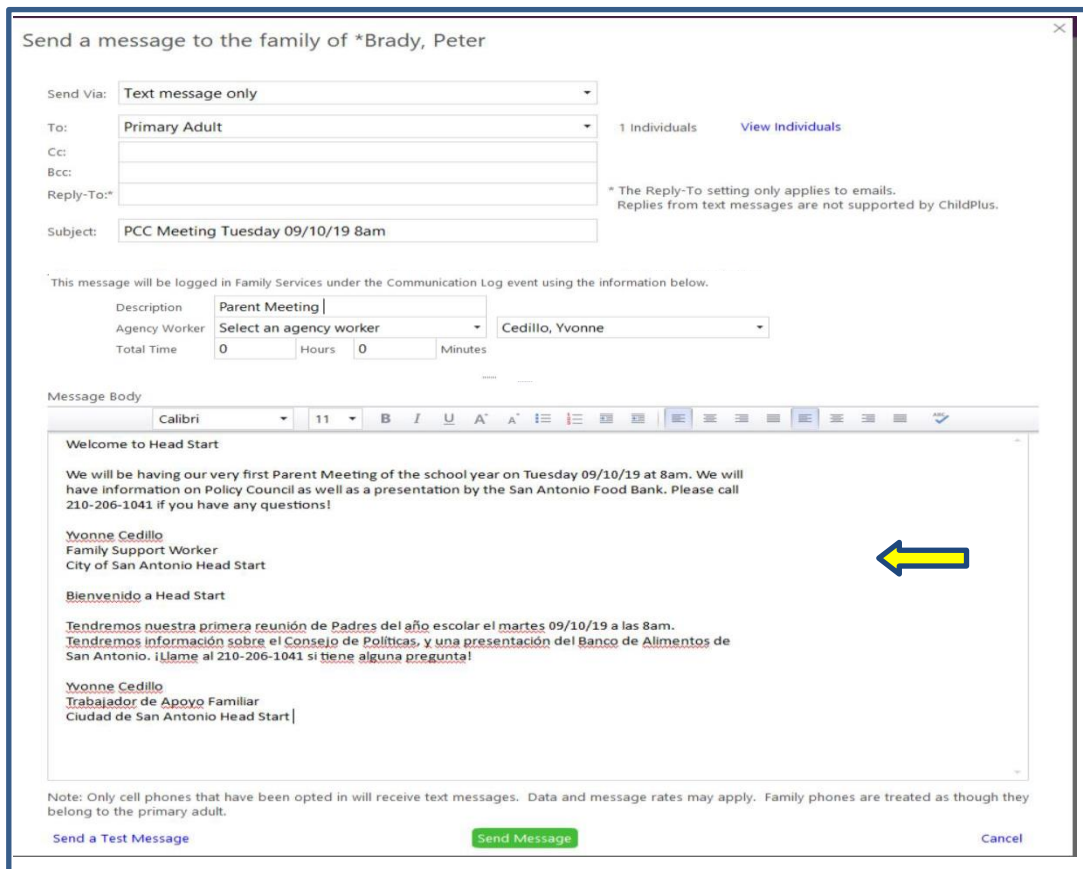
Transportation Education

Wellness Assessment

Options Add Event

1138 Emergency Preparedness Training
1140 Expired Physical
LM00 Blank Email or Text Message to Parents
LM10 Unexpected Absence Notice
R2018 Recruitment

- 3) Write out your message to the family. Remember to provide the Spanish translation if working with bilingual families.



Send a message to the family of *Brady, Peter

Send Via: Text message only

To: Primary Adult 1 Individuals View Individuals

Cc:

Bcc:

Reply-To:

Subject: PCC Meeting Tuesday 09/10/19 8am

* The Reply-To setting only applies to emails.
Replies from text messages are not supported by ChildPlus.

This message will be logged in Family Services under the Communication Log event using the information below.

Description: Parent Meeting |

Agency Worker: Select an agency worker Cedillo, Yvonne

Total Time: 0 Hours 0 Minutes

Message Body

Calibri 11 B I U A⁺ A⁻ |

Welcome to Head Start

We will be having our very first Parent Meeting of the school year on Tuesday 09/10/19 at 8am. We will have information on Policy Council as well as a presentation by the San Antonio Food Bank. Please call 210-206-1041 if you have any questions!

Yvonne Cedillo
Family Support Worker
City of San Antonio Head Start

Bienvenido a Head Start

Tendremos nuestra primera reunión de Padres del año escolar el martes 09/10/19 a las 8am.
Tendremos información sobre el Consejo de Políticas, y una presentación del Banco de Alimentos de San Antonio. ¡Lláme al 210-206-1041 si tiene alguna pregunta!

Yvonne Cedillo
Trabajador de Apoyo Familiar
Ciudad de San Antonio Head Start

Note: Only cell phones that have been opted in will receive text messages. Data and message rates may apply. Family phones are treated as though they belong to the primary adult.

Send a Text Message Send Message Cancel

Using To-Do List to track Follow Up in ChildPlus

If you are using the ChildPlus *To Do List* to help you stay on track with your follow up notes there is just one extra step in your *Add Action Notes* that needs to be filled entered.

Scheduled date: Date of follow up

Action Type	Referral	Type of Contact	Face-to-Face Meeting
Scheduled	10/4/19	Description	Utility Assistance
Action Date	9/5/19	Status	Ongoing
Referred To	City Of San Antonio Utility Ast.	Case Worker	Farias-Ybarra, Cassandra
Referral Type	Written	Total Time	0 Hours 0 Minutes

This will list the event on your *To Do List* in ChildPlus so you can see when the event needs to be followed up on.

Elvia's View

Date	Item	Participant	Location	Staff
Date: Beyond Next Month				
<input type="checkbox"/> 10/4/2019	Closure Expected for Need Identified (Utility Assistance)	Peter *Brady's Family	San Antonio ISD • Arnold Elementary • < No Classroom >	Farias-Ybarra, Cassan...
<input type="checkbox"/> 9/5/2019	Need Identified Referral Status: Ongoing (Utility Assistance)	Peter *Brady's Family	San Antonio ISD • Arnold Elementary • < No Classroom >	Farias-Ybarra, Cassan...

Reminder: If you schedule your To Do list to open each time you log on to ChildPlus, it will assist in keeping you on track with what is needed to do each day. It serves as a daily reminder on what needs to be followed up on. You can also track Health follow ups as well. The trick to using the To Do list is your name must be listed as the Case Worker for the child in the information tabs of both *Family Services* and *Health*.

PIR Data Entry

Head Start Standards state that we must have Record-keeping and Reporting systems to provide the information needed to individualize programs for children and families, monitor the quality of services, assist in planning and management, and ensure delivery of quality services. We have talked about PIR data entry in the *Assigning Participants to your Caseload* section of this data entry guide. There are several ways to find PIR.

- 1) When in each service area you can find PIR in the information tabs.

Family Service Information Tab View

The Family Service questions can be answered by information during the application event, through the Child Health History and *Nutrition Assessment* forms. The remainder will be collected when the *Beginning of the Year Assessment* of the family is completed.

Fatherhood Engagement is an important part of Head Start. A Fathers involvement in the Family Assessment, parent meetings and even goal setting is important information that is needed in PIR. Your event notes should indicate their involvement in these events. This data is also required in PIR. These questions are designated at the End of Enrollment; however, you may begin to fill in your answers throughout the year as you work with families.

The Needs Received fields are the last part of the Family Services Section. This section is directly linked to the services that were provided to the family all year. This information is collected through assessments, needs identified, referrals given for services or assistance with goals. The Community Resource Form helps us track the work that we do with the families so that we can show documentation that services were provided. Our follow-up notes in ChildPlus reveal whether services were obtained. These should be filled in as soon as needs are identified and services are given and received, for each category, throughout the year.

Health Information Tab View

The *Health Services* section questions can be answered by information during the application event through the Child Health History and Nutrition Assessment forms. The remainder will be collected when the Beginning of the Year Assessment of the family is completed.

If insurance coverage was not answered during the application process, you can obtain this information during your Family Meeting Home Visit. Data clerks will fill out immunization information.

Primary Health Coverage PR
At Enrollment: Medicaid
At End of Enrollment: Medicaid
Dental Coverage Number: Combined Medicaid/CHIP
Medicaid Eligibility Number: 123156478
Other Health Coverage Insurance Number:
Health/Dental Coverage Notes:
Did the child:
At Enrollment: Yes - No -
At End of Enrollment: Yes - No -
WIC PR: WIC ID:
Note: WIC information can also be edited in Family Services
Have a Medical Home (ongoing source of continuous, accessible health care) PR
Receive medical services through the Indian Health Service PR
Receive medical services through a migrant community health center PR
Have a Dental Home (continuous, accessible dental care provided by a dentist) PR

There is a section in Health that ChildPlus will automatically report to PIR. FSWs will not enter any information in the section below.

Calculation Preferences for PIR, Health, and Education Requirements
How should this participant be counted for the following PIR questions?
Note: If you select "Auto", ChildPlus will calculate the answer automatically using information from Health Events, Health Actions, or Enrollment
C.8(1) - Up-to-date on health care (at enrollment) PR
C.8(2) - Up-to-date on health care (at end of enrollment) PR
C.8.a - Needs treatment for a chronic condition PR
C.8.a.1 - Received treatment for a chronic condition PR
C.8.a - Received treatment for Anemia PR
C.8.b - Received treatment for Asthma PR
C.8.c - Received treatment for Hearing Difficulties PR
C.8.d - Received treatment for Vision Problems PR
C.8.e - Received treatment for High Lead Levels PR
C.8.f - Received treatment for Diabetes PR
C.10 - BMI Weight Category PR
C.18 - Receive preventative dental care PR
C.19 - Completed a professional dental exam PR
C.19.a - Needs dental treatment PR
C.19.a.1 - Received dental treatment PR
C.20 - Up to date on preventative and primary oral health care PR
C.20 - Newly Enrolled PR
If the participant is counted for question C.20, how should question C.20 be calculated? PR
C.8, C.20, C.20 Notes:
What date should ChildPlus use for calculating Health and Education Requirements? Help
For requirements that are due once per program term: Program Term Entry Date
For requirements that are due once per program: Program Entry Date

- 2) You can also click on the PIR area. This PIR view shows you all questions that must be answered in each section for the year.

Peter *Brady's Family
Male DOB: 7/01/14 5y 0m CPID: 259121
New 7/8/15 • Year 1
Head Start 2015 - 2016 • San Antonio ISD • < No Site > • < No Classroom > • Head Start.1
Application Enrollment Family Services Health Immunizations Disability Transportation Education Attendance PIR
Events Family Outcomes Family Services Information Attachments (3) BOY Wellness Assessment EOY Wellness Assessment
Family Services Events Options Add Event
Date Event Description Associated With Progress Time Care Worker Action

Family Services

☐ Homeless Family PIR
☐ Acquired housing during the program year PIR
☐ Referred for services by a child welfare agency PIR
☐ Foster care during program year PIR
☐ Program receives a child care subsidy for this child PIR

At End of Enrollment
☐ No ☐ Yes ☐ TANF PIR
☐ No ☐ Yes ☐ SSI PIR
☐ Yes ☐ Yes ☐ WIC PIR
☐ No ☐ Receiving Supplemental Nutrition Assistance Program (SNAP) PIR
☐ No ☐ At least one parent/guardian is an active duty member of United States military PIR
☐ No ☐ At least one parent/guardian is a veteran of the United States military PIR

At least one parent/guardian completed the following during this program year:

At End of Enrollment
☐ No ☐ Grade level in school, prior to high school graduation (e.g. 8th grade, 11th grade) PIR
☐ No ☐ High school or was awarded GED PIR
☐ No ☐ Associate degree PIR
☐ No ☐ Baccalaureate or advanced degree PIR
☐ No ☐ Job training program, professional certificate or license PIR

Activities a father/father figure engaged in during this program year:

At End of Enrollment
☐ Yes ☐ Family Assessment PIR
☐ Yes ☐ Family goal setting PIR
☐ No ☐ Involvement in child's Head Start development experiences (e.g. home visits, parent-teacher conferences, etc.) PIR
☐ No ☐ Head Start program governance, such as participation in Policy Council or policy committees PIR
☐ Yes ☐ Parenting education workshops PIR

Need PIR Identified	Services Received	Need PIR Identified	Services Received
<input type="checkbox"/> No	<input type="checkbox"/> No <input type="checkbox"/> Emergency PIR	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes <input type="checkbox"/> Job Training PIR
<input type="checkbox"/> No	<input type="checkbox"/> No <input type="checkbox"/> Crisis Assistance PIR	<input type="checkbox"/> No	<input type="checkbox"/> No <input type="checkbox"/> Substance Abuse Prevention PIR
<input type="checkbox"/> Yes	<input type="checkbox"/> Yes <input type="checkbox"/> Food PIR	<input type="checkbox"/> No	<input type="checkbox"/> No <input type="checkbox"/> Substance Abuse Treatment PIR
<input type="checkbox"/> Yes	<input type="checkbox"/> Yes <input type="checkbox"/> Clothing PIR	<input type="checkbox"/> No	<input type="checkbox"/> No <input type="checkbox"/> Child Abuse and Neglect Services PIR
<input type="checkbox"/> No	<input type="checkbox"/> No <input type="checkbox"/> Transportation	<input type="checkbox"/> No	<input type="checkbox"/> No <input type="checkbox"/> Domestic Violence Services PIR
<input type="checkbox"/> No	<input type="checkbox"/> No <input type="checkbox"/> Housing Assistance PIR	<input type="checkbox"/> No	<input type="checkbox"/> No <input type="checkbox"/> Child Support Assistance PIR
<input type="checkbox"/> No	<input type="checkbox"/> No <input type="checkbox"/> Mental Health Services PIR	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes <input type="checkbox"/> Health Education (including Prenatal) PIR
<input type="checkbox"/> No	<input type="checkbox"/> No <input type="checkbox"/> Literacy or Education	<input type="checkbox"/> No	<input type="checkbox"/> No <input type="checkbox"/> Assistance to Families of incarcerated PIR
<input type="checkbox"/> No	<input type="checkbox"/> No <input type="checkbox"/> English as a Second Language PIR	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes <input type="checkbox"/> Parenting Education PIR
<input type="checkbox"/> No	<input type="checkbox"/> No <input type="checkbox"/> Adult Education PIR	<input type="checkbox"/> No	<input type="checkbox"/> No <input type="checkbox"/> Marriage Education PIR
		<input type="checkbox"/> No	<input type="checkbox"/> No <input type="checkbox"/> Asset Building Services PIR

Health

Primary Health Coverage PIR: At Enrollment ☐ Medicaid ☐ At End of Enrollment ☐ Medicaid
 Immunization Status PIR: Completed all for age ☐ Completed all for age ☐

Does the child:

At Enrollment ☐ Yes ☐ Yes ☐ Have a Medical Home (ongoing source of continuous, accessible health care) PIR
 At End of Enrollment ☐ No ☐ No ☐ Receive medical services through the Indian Health Service? PIR
☐ No ☐ No ☐ Receive medical services through a migrant community health center? PIR
☐ Yes ☐ Yes ☐ Have a Dental Home (continuous, accessible dental care provided by a dentist) PIR

Reminder: PIR is reported once a year and some sections have Benchmark Due Dates for data entry. It is best practice to stay current with PIR throughout the year so your caseload is ready when PIR reporting is due.

ChildPlus Reports for Case Management Assistance

Report 1015 Participant ID DOB Age Listing Report: This report will list students in the classroom you have been assigned to. A helpful tip is you can use this list when doing dentals, lead testing or flu shots. It prevents you from missing a child when submitting needed documents.

- 1) Enter Report Number: 1015
- 2) Program Term: Current Year

ChildPlus

Services To-Do List Entry Express Management Dashboard Reports Setup Enter Report #

Select a Report 1015 - Participant ID DOB AGE Listing

General Custom Filters (0) Individuals

Program/Term HEAD START 2019 - 2020

Program Option <ALL>

Group < All Groups >

Group By Agency

Agency San Antonio ISD

Site Nelson Center

Classroom 121 Reed E3/4 17

Advanced Setup ☐ Use Advanced Setup

Status ☐ All Report Type Show Participants

Number Name

1013n ERSEA discrepancies

1014 Inspections (Grid)

1014 Application Status

1015 Participant ID DOB AGE Listing

1015b Participant ID DOB AGE Listing 2

1015c Participant ID DOB Listing

1015d Participant CP-ID ISD-ID Listing

1016 Graduate School District Report

1017 Participant Emergency/Pickup Listing

1018 Participant Entry/Exit Date Report

1019 Participant Entry/Enroll Date Report

1020 income

1021 SAISD Mail Out

1022 **Center Listing/Family Count

1023 Family Phone Number Listing

Press F7 at any time to enter a report number.

- 3) Agency: District you are assigned to
4) Site: Site you are assigned to

Select a Report 1015 - Participant ID DOB AGE Listing x

General Custom Filters (0) Individuals

Program/Term HEAD START 2019 - 2020

Program Option <ALL>

Group < All Groups >

Group By Agency

Agency San Antonio ISD

Site Nelson Center

Classroom < All Classrooms >

Advanced Setup ☐ Use Advanced Setup

☒ Suppress Duplicate Records

- 5) Classroom: Classroom you are assigned to
- 6) Status: Enrolled (During Summer you would click on Accepted)
- 7) Report Type: Detail

Select a Report 1015 - Participant ID DOB AGE Listing

General Custom Filters (0) Individuals

Program/Term HEAD START 2019 - 2020

Program Option <ALL>

Group < All Groups >

Group By Agency

Agency San Antonio ISD

Site Nelson Center

Classroom < All Classrooms >

Advanced Setup Use Advanced Setup

Status ☐ All

☐ New

☐ Accepted

☐ Waitlisted

☒ Enrolled

☐ Dropped

☐ Drop/Wait

☐ Drop/Accept

☐ Completed

☐ Abandoned

Report Type

☒ Detail

☐ Summary

Show Participants

☒ whose enrollment date is between

☐ that were enrolled at least one day between

Begin Date

End Date

Additional Criteria (optional)

View: Report 1015

[illegible]

Report 1086 Intake Completion Report: Shows if Release Signed and dates have been entered into ChildPlus correctly after inputting an application or new enrollment.

- 1) Enter Report Number: 1086
- 2) Program Term: Current Year

ChildPlus

Services To-Do List Entry Express Management Dashboard Reports Setup 1086 - Intake...

Select a Report 1086 - Intake Completion Report

General Custom Filters (0) Individuals

Program/Term HEAD START 2019 - 2020 ☒ Suppress Duplicate Records

Program Option <ALL>

Group < All Groups >

Group By Agency

Agency Edgewood ISD

Number	Name
1086	Intake Completion Report

- 3) Agency: District you are assigned to
- 4) Site: Site you are assigned to

Select a Report 1086 - Intake Completion Report

General Custom Filters (0) Individuals

Program/Term HEAD START 2019 - 2020 ☒ Suppress Duplicate Records

Program Option <ALL>

Group < All Groups >

Group By Agency

Agency Edgewood ISD

Site Stafford Early Childhood Center

Classroom 206 FUENTES, M 17 3 S

Advanced Setup ☐ Use Advanced Setup

Status ☐ All

☐ New
☐ Accepted
☐ Waitlisted
☒ Enrolled
☐ Dropped
☐ Drop/Wait
☐ Drop/Accept
☐ Completed
☐ Abandoned

Report Type
☒ Detail
☐ Summary

Show Participants
☒ whose enrollment date is between
☐ that were enrolled at least one day between

Begin Date

End Date

- 5) Classroom: Classroom you are assigned to
- 6) Status: Enrolled (During Summer you would click on Accepted)
- 7) Report Type: Detail

Select a Report 1086 - Intake Completion Report

General Custom Filters (0) Individuals

Program/Term HEAD START 2019 - 2020 ☒ Suppress Duplicate Records

Program Option <ALL>

Group < All Groups >

Group By Agency

Agency Edgewood ISD

Site Stafford Early Childhood Center

Classroom 206 FUENTES, M 17 3 S

Advanced Setup ☐ Use Advanced Setup

Status ☐ All

☐ New
☐ Accepted
☐ Waitlisted
☒ Enrolled
☐ Dropped
☐ Drop/Wait
☐ Drop/Accept
☐ Completed
☐ Abandoned

Report Type
☒ Detail
☐ Summary

Show Participants
☒ whose enrollment date is between
☐ that were enrolled at least one day between

Begin Date

End Date

Additional Criteria (optional)

View: Report 1086

7/12/2019 10:02 PM
epace

Office Of Head Start
1086 - Intake Completion Report

Page 1 of 1

Term: Head Start 2018 - 2019, Agency: Edgewood ISD, Site: Stafford Early Childhood Center, Classroom: 206 FUENTES, M 17 3 S, Status: Enrolled

Edgewood ISD
Stafford Early Childhood Center
206 FUENTES, M 17 3 S

ChildPlus ID	Name (First Last)	Release Signed	Release Signed Date	Accepted Date	Case Worker
		Yes	06/05/2018	05/25/2018	Antonia Perez
		Yes	08/10/2018	07/31/2018	Antonia Perez
		Yes	09/04/2018	08/29/2018	Antonia Perez
		Yes	05/24/2019	08/13/2018	Antonia Perez
		Yes	04/25/2018	05/25/2018	Antonia Perez
		Yes	04/09/2018	03/01/2018	Perla Trevino
		Yes	04/29/2019	03/01/2018	Antonia Perez
		Yes	08/27/2018	08/24/2018	Antonia Perez
		Yes	09/12/2017	02/23/2018	Antonia Perez
		Yes	06/31/2018	06/25/2018	Antonia Perez
		Yes	05/11/2018	04/16/2018	Antonia Perez
		Yes	08/03/2018	06/07/2018	Antonia Perez
		Yes	05/30/2018	05/25/2018	Antonia Perez
		Yes	06/01/2018	05/25/2018	Antonia Perez
		Yes	04/09/2018	03/01/2018	Antonia Perez
		Yes	06/18/2018	05/25/2018	Antonia Perez
		Yes	05/02/2018	04/16/2018	Antonia Perez

Summary Information for Classroom
206 FUENTES, M 17 3 S

17 17 Yes

Person Information for Site

Report 2132 Participant Attachment Listing: Lists attachments you have entered in ChildPlus. This report is helpful when you are checking to make sure all documents have been attached in ChildPlus.

- 1) Enter Report Number: 2132
- 2) Program Term: Current Year

ChildPlus

Services To-Do List Entry Express Management Dashboard Reports Setup

Select a Report 2132 - Participant Attachment Listing

General Custom Filters Individuals

Program Term HEAD START 2019 - 2020

Program Option <ALL>

Group < All Groups >

Group By Agency

Agency Edgewood ISD

Site Cardenas Early Childhood Center

Classroom 3 PRECIADO-RAMON, 20 3/4S

Responsible Staff Don't filter by r...

Show attachments from these service areas ☐ All

Application

☐ Attendance

☐ Disability

☐ Education

☐ Enrollment

☐ Family

☒ Family Services

☐ Health

☐ Show all attachments

☒ Show all attachments added during a certain c

Number Name

2132 Participant Attachment Listing

- 3) Agency: District you are assigned to
- 4) Site: Site you are assigned to

Select a Report 2132 - Participant Attachment Listing

General Custom Filters Individuals

Program Term HEAD START 2019 - 2020

Program Option <ALL>

Group < All Groups >

Group By Agency

Agency Edgewood ISD

Site Cardenas Early Childhood Center

Classroom 3 PRECIADO-RAMON, 20 3/4S

Responsible Staff Don't filter by r...

Show attachments from these service areas ☐ All

Application

☐ Attendance

☐ Disability

☐ Education

☐ Enrollment

☐ Family

☒ Family Services

☐ Health

☐ Show all attachments

☒ Show all attachments added during a certain c

Advanced Setup

Status ☐ All

Grouping ☐ Agency

Report Type ☒ Detail

☐ Show all

☒ Show o

3/1/1

- 5) Classroom: Classroom you are assigned to
- 6) Status: Enrolled (During Summer you would click on Accepted)

The screenshot shows the 'Select a Report' window with the 'General' tab selected. The 'Classroom' dropdown is set to '3 PRECIADO-RAMON, 20 3/4S'. The 'Status' list on the left has 'Enrolled' checked. A yellow arrow points to the 'Classroom' dropdown, and another yellow arrow points to the 'Enrolled' status option.

- 7) Grouping: Classroom
- 8) Report Type: Detail

The screenshot shows the 'Select a Report' window with the 'General' tab selected. The 'Grouping' radio button is set to 'Classroom'. The 'Report Type' radio button is set to 'Detail'. A yellow arrow points to the 'Classroom' grouping option, and another yellow arrow points to the 'Detail' report type option.

- 9) Show Attachments from service area: Area you are working in
- 10) Show Attachment type: Form you are looking for (Permission of services, Physicals, Family Partnership Agreement, Family Meeting Home Visit, etc)
- 11) Show All Attachments: Enter Time Period you are looking for
- 12) Show all participants (You can decide what you want to see)

The screenshot shows the 'Select a Report' window with the 'General' tab selected. The 'Show attachments from these service areas' list has 'Family Services' checked. The 'Show attachments of these types' list has 'FPA - Family Partnership Agreement' checked. The 'Show all attachments added during a certain date range' is selected, with the date range set to '3/18/19' to '8/26/19'. The 'Show all participants' radio button is selected. A yellow arrow points to the 'Family Services' service area, another yellow arrow points to the 'FPA - Family Partnership Agreement' attachment type, a third yellow arrow points to the date range, and a fourth yellow arrow points to the 'Show all participants' radio button.

View: Report 2132

7/12/2019 10:10 PM

Office Of Head Start
2132 - Participant Attachment Listing

Page 1 of 1
epace

Program Term: Head Start 2018 - 2019, Agency: Edgewood ISD, Site: Cardenas Early Childhood Center, Classroom: 3 PRECIADO-RAMON, 20 3/4s, Enrollment Status: Enrolled
 Service Areas: Family Services, Attachment Types: FMV - Family Meeting/Home Visit Form, Attachment added between 3/1/18 and 7/2/18, Participants with Attachments

Cardenas Early Childhood Center - 3 PRECIADO-RAMON, 20 3/4s

Participant	Service Area	Attachment Type	Description	Attached To	Added	Added By	File Name	Size
	Family Services	Family Meeting/Home	View 2018-2019	Family	5/14/18	Ortiz, Michelle	denisse hv.pdf	298K
	Family Services	Family Meeting/Home	View 2018-2019	Family	4/29/18	Villalta, Virgini	pr hv04292018095222	306K
	Family Services	Family Meeting/Home	View 2018-2019	Family	4/10/18	Ortiz, Michelle	karen estrada home vis	313K
	Family Services	Family Meeting/Home	View 2018-2019	Family	6/13/18	Ortiz, Michelle	damian hv.pdf	267K
	Family Services	Family Meeting/Home	View 2018-2019	Family	4/12/18	Ortiz, Michelle	itzel home visit.pdf	278K
	Family Services	Family Meeting/Home	View 2018-2019	Family	6/07/18	Villalta, Virgini	jn hv05142018165042	291K
	Family Services	Family Meeting/Home	View 2018-2019	Family	5/07/18	Ortiz, Michelle	ruith handbook_001.pdf	289K
	Family Services	Family Meeting/Home	View 2018-2019	Family	5/08/18	Ortiz, Michelle	lazarus hv.pdf	273K
	Family Services	Family Meeting/Home	View 2017-2018	Family	3/05/18	Kian, Farahna	FERNANDORAMIREZ	369K
	Family Services	Family Meeting/Home	View 2018-2019	Family	4/11/18	Ortiz, Michelle	fernando home visit.pdf	309K
	Family Services	Family Meeting/Home	View 2018-2019	Family	5/03/18	Ortiz, Michelle	mariana home visit.pdf	304K
	Family Services	Family Meeting/Home	View 2018-2019	Family	6/07/18	Ortiz, Michelle	adriel hv.pdf	292K
	Family Services	Family Meeting/Home	View 2018-2019	Family	5/07/18	Ortiz, Michelle	jayden hv.pdf	332K

Report 4070 Family Services List: Lists Family Events that have been made in ChildPlus (Goals, Need Identified, Family Meeting Home Visit, etc) You can verify your data entry using this report and cross-reference the 2132 Participant Attachment Listing Report.

- 1) Enter Report Number: 4070
- 2) Program Term: Current Year

ChildPlus

Services To-Do List Entry Express Management Dashboard Reports Setup

Select a Report 4070 - *Family Services List - Events

General Custom Filters (0) Individuals

Program/Term HEAD START 2019 - 2020

Program Option <ALL>

Group < All Groups >

Group By Agency

Agency San Antonio ISD

Site De Zavala Elementary

Classroom *Moreno 111 E4 16

Advanced Setup Use Advanced Setup

Status All Report Type Detail

Show Participants whose enrollment date is between

Event Type All Event Types

Attendance

Communication Log

EHS-Child Care Services

EHS-Transitions

Family Goal

Initial Set 3/1/18

Begin Date 8/13/18

End Date

Press F7 at any time to enter a report number.

- 3) Agency: District you are assigned to
- 4) Site: Site you are assigned to

ChildPlus

Services To-Do List Entry Express Management Dashboard Reports Setup

Select a Report 4070 - *Family Services List - Events

General Custom Filters (0) Individuals

Program/Term HEAD START 2019 - 2020

Program Option <ALL>

Group < All Groups >

Group By Agency

Agency San Antonio ISD

Site De Zavala Elementary

Classroom *Moreno 111 E4 16

Advanced Setup Use Advanced Setup

Status All Report Type Detail

Show Participants whose enrollment date is between

Event Type All Event Types

Attendance

Communication Log

EHS-Child Care Services

EHS-Transitions

Family Goal

Initial Set 3/1/18

Begin Date 8/13/18

End Date

Press F7 at any time to enter a report number.

- 5) Classroom: Classroom you are assigned to
- 6) Status: Enrolled (During Summer you would click on Accepted)

- 7) Report Type: Summary (Detail will show notes)
- 8) Show Participants: You can leave on “whose enrollment date is between” Or you can be specific and chose a date range

- 9) Event Type: Event you are looking for
- 10) Initial Service Date: Enter Time Period you are looking for

View: Report 4070

Date	Progress Code Description	Event Notes
11/25/2013	Progress Code Description	Event Notes
10/21/2014	Progress Code Description	Event Notes
11/16/2013	Progress Code Description	Event Notes
07/15/2014	Progress Code Description	Event Notes
06/16/2014	Progress Code Description	Event Notes
03/10/2014	Progress Code Description	Event Notes
06/03/2014	Progress Code Description	Event Notes
10/12/2013	Progress Code Description	Event Notes
10/22/2013	Progress Code Description	Event Notes

Report 4133 Family Service Event Data: Report will list all events that have been made in ChildPlus (Goals, Need Identified, Family Meeting Home Visit, etc) all in one view. You can verify your data entry using this report and cross-reference the 2132 Participant Attachment Listing Report.

- 1) Enter Report Number: 4133
- 2) Program Term: Current Year

- 3) Agency: District you are assigned to
- 4) Site: Site you are assigned to

ChildPlus
Services To-Do List Entry Express Management Dashboard Reports Setup 4133 - Famil...

Select a Report 4133 - Family Service Event Data

General Custom Filters

Program Term Head Start 2019-2020 9/9/19

Program Option <ALL> 2/29/20

Group < All Groups >

Group By Agency

Agency Edgewood ISD

Site Cardenas Early Childhood Center

Classroom < All Classrooms >

Responsible Staff Don't filter by r...

Report columns to show < All Columns >

Grid lines ☒ Horizontal

Advanced Setup

Status ☐ All ☐ New ☐ Waitlisted ☐ Accepted ☒ Enrolled ☐ Dropped ☐ Drop/Wait ☐ Drop/Accept ☐ Completed ☐ Abandoned

Grouping ☐ Agency ☒ Site ☐ Classroom

Report Type ☒ Detail ☐ Summary ☐ Worksheet ☐ Individual

4133 - Family Service Event Data

Press F7 at any time to enter a report number.

- 5) Classroom: Classroom you are assigned to (You can use the advanced set up to see all of your classrooms or just one at a time)
- 6) Status: Enrolled (During Summer you would click on Accepted)

ChildPlus
Services To-Do List Entry Express Management Dashboard Reports Setup Enter Report #

Select a Report 4133 - Family Service Event Data

General Custom Filters

Program Term Head Start 2019-2020 9/9/19

Program Option <ALL> 2/29/20

Group < All Groups >

Group By Agency

Agency Edgewood ISD

Site Cardenas Early Childhood Center

Classroom 11 GALVEZ, G 16 3S

Responsible Staff Don't filter by r...

Report columns to show < All Columns >

Grid lines ☒ Horizontal ☐ Vertical

Advanced Setup

Status ☐ All ☐ New ☐ Waitlisted ☐ Accepted ☒ Enrolled ☐ Dropped ☐ Drop/Wait ☐ Drop/Accept ☐ Completed ☐ Abandoned

Grouping ☐ Agency ☐ Site ☒ Classroom

Report Type ☒ Detail ☐ Summary ☐ Worksheet ☐ Individual

- 7) Grouping: How you would like to see the report. It can be separated by Agency, Site or Classroom)
- 8) Report Type: Summary (Detail will show notes)

ChildPlus
Services To-Do List Entry Express Management Dashboard Reports Setup Enter Report #

Select a Report 4133 - Family Service Event Data

General Custom Filters

Program Term Head Start 2019-2020 9/9/19

Program Option <ALL> 2/29/20

Group < All Groups >

Group By Agency

Agency Edgewood ISD

Site Cardenas Early Childhood Center

Classroom 11 GALVEZ, G 16 3S

Responsible Staff Don't filter by r...

Report columns to show < All Columns >

Grid lines ☒ Horizontal ☒ Vertical

Advanced Setup

Status ☐ All ☐ New ☐ Waitlisted ☐ Accepted ☒ Enrolled ☐ Dropped ☐ Drop/Wait ☐ Drop/Accept ☐ Completed ☐ Abandoned

Grouping ☐ Agency ☐ Site ☒ Classroom

Report Type ☒ Detail ☐ Summary ☐ Worksheet ☐ Individual

- 9) Initial Service Date: Enter Time Period you are looking for
- 10) Report Columns: leave all columns
- 11) Grid lines: Leave horizontal and vertical indicated

The screenshot shows the 'ChildPlus' Reports Setup interface. The 'General' tab is active, displaying various filters and settings. Three yellow arrows point to specific fields: the first arrow points to the date range '9/9/19' to '2/29/20'; the second arrow points to the 'Report columns to show' dropdown set to '< All Columns >'; and the third arrow points to the 'Grid lines' section where both 'Horizontal' and 'Vertical' checkboxes are checked. The 'Advanced Setup' section is also visible, showing status, grouping, and report type options.

- 12) Hit View in Grid

This screenshot shows the same 'ChildPlus' Reports Setup interface as the previous one, but with a yellow arrow pointing to the 'View in Grid' button located in the top right corner of the main content area. The button is represented by a grid icon and the text 'View in Grid'.

13) View of Report in ChildPlus. Report can be viewed in summary and detail view. You can see individual schools and Events as well.

Services To-Do List Entry Express Management Dashboard Reports Setup Enter Report # Community Help

Select a Report4133 - Family Service Event Data

ReportAgencySiteFamilyParticipant

Initial Date	Event Type	Description	Service Area	Issue	Family Outcome
Report: Family Service Event Data					
Agency: Edgewood ISD					
Site: Cardenas Early Childhood Center					
<blank>: 1095 Education: 1 <blank>: 1124 Advanced Educ					
Events	1252				
Event Type	Communication Log: 184	EHS-Child Care Services: 3	EHS-Transitions: 1	Family Goal: 343	Family Meeting/Home Visit: 374 Interest Identified: 1 Mental Wellness Services: 16 Need Identified: 161
Families	308				
Site: Loma Park Elementary					
<blank>: 107 Family: 1 Goal <blank>: 109 Family Routines:					
Events	137				
Event Type	Communication Log: 21	Family Goal: 36	Family Meeting/Home Visit: 38	Mental Wellness Services: 1	Need Identified: 10 Pedestrian & Bus Safety Training/Parent Handbook: 1 RFA-Mental Health:
Families	34				
Site: Stafford Early Childhood Center					
<blank>: 1361 Family: 6 Goa <blank>: 1387 Advanced Educ					
Events	1591				
Event Type	Communication Log: 224	EHS-Child Care Services: 8	Family Goal: 391	Family Goal: Family Life Practice: 1	Family Meeting/Home Visit: 427 Home Visit: 2 Mental Wellness Services: 22 Need...
Families	362				
Subtotals for Agency: Edgewood ISD					
<blank>: 2563 Education: 1 f <blank>: 2620 Advanced Educ					
Events	2980				
Event Type	Communication Log: 429	EHS-Child Care Services: 11	EHS-Transitions: 1	Family Goal: 770	Family Goal: Family Life Practice: 1 Family Meeting/Home Visit: 839 Home Visit: 2 Interest Identified: 1 ...
Families	704				

This report can also be exported and used with filters. I encourage you to play around with this report when looking at your events Family Meeting/Home Visits, Goals, Needs as well as Agency, Site and Case Worker.

Agency	Site	Case Worker	Participant	Initial Date	Event Type	Description	Service Area	Issue	Family Outcom
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		9/27/2019	Family Goal	2019-2020	Goal 1: Family Life Practi	Reading at Home with Ch	Positive Parent-C
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		12/9/2019	Family Goal	2019-2020	Goal 1: Family Life Practi	Family Routines	Positive Parent-C
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		1/15/2020	Family Goal	2019-2020	Goal 3: Family Self-Suffic	Home Ownership	Family Well-Bein
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		11/15/2019	Family Goal	2019-2020	Goal 1: Family Life Practi	Reading at Home with Ch	Positive Parent-C
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		12/16/2019	Family Goal	2019-2020	Goal 1: Family Life Practi	Reading at Home with Ch	Positive Parent-C
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		12/4/2019	Family Goal	2019-2020	Goal 1: Family Life Practi	Reading at Home with Ch	Positive Parent-C
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		11/13/2019	Family Goal	2019-2020	Goal 1: Family Life Practi	Parent/Child Activities in	Positive Parent-C
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		12/11/2019	Family Goal	2019-2020	Goal 1: Family Life Practi	Parent/Child Activities	Positive Parent-C
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		12/11/2019	Family Goal	2019-2020	Goal 1: Family Life Practi	Parent/Child Activities	Positive Parent-C
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		9/4/2019	Family Goal	2019-2020	Goal 1: Family Life Practi	Parent/Child Activities	Positive Parent-C
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		1/17/2020	Family Goal	2019-2020	Goal 1: Family Life Practi	Reading at Home with Ch	Positive Parent-C
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		1/8/2020	Family Goal	2019-2020	Goal 3: Family Self-Suffic	Advanced Education	Families as Lifelo
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		10/30/2019	Family Goal	2019-2020	Goal 3: Family Self-Suffic	GED Level of Knowledge	Families as Lifelo
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		11/22/2019	Family Goal	2019-2020	Goal 1: Family Life Practi	Reading at Home with Ch	Positive Parent-C
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		9/27/2019	Family Goal	2019-2020	Goal 1: Family Life Practi	Reading at Home with Ch	Positive Parent-C
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		12/18/2019	Family Goal	2019-2020	Goal 1: Family Life Practi	Parent/Child Activities	Positive Parent-C
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		12/18/2019	Family Goal	2019-2020	Goal 3: Family Self-Suffic	GED Level of Knowledge	Families as Lifelo
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		9/16/2019	Family Goal	2019-2020	Goal 1: Family Life Practi	Reading at Home with Ch	Positive Parent-C
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		9/16/2019	Family Goal	2019-2020	Goal 1: Family Life Practi	Reading at Home with Ch	Positive Parent-C
San Antonio ISD	Huppertz Elementary	Zuniga, Senisa		11/6/2019	Family Goal	2019-2020	Goal 1: Family Life Practi	Reading at Home with Ch	Families as Lifelo