How to enroll a new family in Visit Tracker

Enter new family (and primary caregiver)	→	Add additional caregiver(s)	→	Enter family and caregiver demographics	→	Add child(ren)	→	Enter child health info

When a new family enrolls in your program, there are several forms that need to be completed in Visit Tracker. The first is the "Enter New Family" form, which asks for information about the family overall and information about the family's primary caregiver.

Enter New Family Form

Family Information:
- ☐ Enrollment Date
- ☐ Consent Status
- ☐ Funding Code

Primary Caregiver Information:
- ☐ Date of Birth
- ☐ Ethnicity
- ☐ Race
- ☐ Gender
- ☐ Marital Status
- ☐ Primary Language

To enter a new family's enrollment information:

1. From the Home Page, click on the "New Family" link in the left vertical menu bar.

   ⤷ Log Out
   🏠 Home Page
   » **New Family**
   » Export Data

2. You will be directed to the "Enter New Family" form. In the first section of the form, enter:
   a. **Family Name** – the family's last name (if the family has more than one last name, you may enter each or hyphenate them – whatever best represents the family as a whole.)
   b. **Guardian First Name** – the *primary* guardian's first name
   c. **Last Name** – the *primary* guardian's last name
   d. If the family consented to sharing identifiable information (see step 3), the family's address is also required.

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3. The next required field is the guardian consent field. Fill in the guardian's response to whether or not they consented to sharing their identifiable data with the State of Washington. **If you don't see this field, refer to the "Customizing Preferences to Match HVSA Reporting Requirements" document for instructions on how to enable it.** This document can be found in the "Overview of HVSA Data Requirements" section of the Data Collection page on DCYF's Home Visiting website.

Note: This field is used to document whether or not the caregiver agreed to share identifiable information, such as their name, address, child's name, etc., with DCYF and DOH. This information is used to link HVSA families with other state-sponsored databases to understand the success of families across the continuum of services. **It's not to be confused with PAT's Participation Agreement and Consent for Services.**

To learn more, check out Step 6: Consent to Share Identifiable Data in the "Sharing Data with the Washington State Department of Health" section of the Data Collection page on DCYF's Home Visiting website. You can also find sample consent forms here:

Sample Parental Consent Form (English)
Sample Parental Consent Form (Spanish)

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4. Next, fill in the family's Site/Fund Code. If the family is funded by the HVSA, it's essential that the family is assigned an HVSA funding code (MIECHV, HVSA-502, HVSA-TANF, or HVSA-GFS). If you don't see the HVSA funding codes in your Site/Fund Code drop-down menu, contact homevisiting@doh.wa.gov.

Site/Fund Code	No Code
	HVSA-502
Referral Source	HVSA-GFS
	HVSA-TANF
Ethnic Category	MIECHV
Race	No Code

5. Next, record the primary caregiver's demographic information. The fields outlined below are each required by the HVSA.

Ethnic Category	Non-Hispanic/Latino		
Race	American Indian or Alaskan Native		
Guardian Gender	Female (F)	DOB	09/09/1992
Marital Status	Not married but living tog		
Primary Language	English		

Note that Visit Tracker allows you to enter multiple races (select all that apply). If the caregiver shares the individual races they identify with, please select each in the Race drop down menu.

6. Finally, enter the family's Enrollment Info. Click on the arrow next to "Current Status" and choose "Active" from the drop-down menu.

Enrollment Info	?
Current Status	Select Status

7. An enroll date field will appear. Enter the date the family enrolled in your program, which is usually the date of the first home visit.

8. After completing this form, you must click "Create" at the bottom of the page to save all information entered in the *Enroll New Family* form.

Next you'll need to enter information about additional caregivers, if applicable. In general, all caregivers who regularly participate in the program should be documented in Visit Tracker. Because the definition of "regular participation" may vary from program to program, each program may decide for themselves who to enroll and enter in Visit Tracker based on what makes sense for the families they serve. **Programs are required to collect all demographic data for each caregiver entered into Visit Tracker.**

Enter New Guardian Form

Includes questions about additional/non-primary caregivers, including:

☐ Date of Birth   ☐ Gender
☐ Ethnicity   ☐ Marital Status
☐ Race   ☐ Primary Language
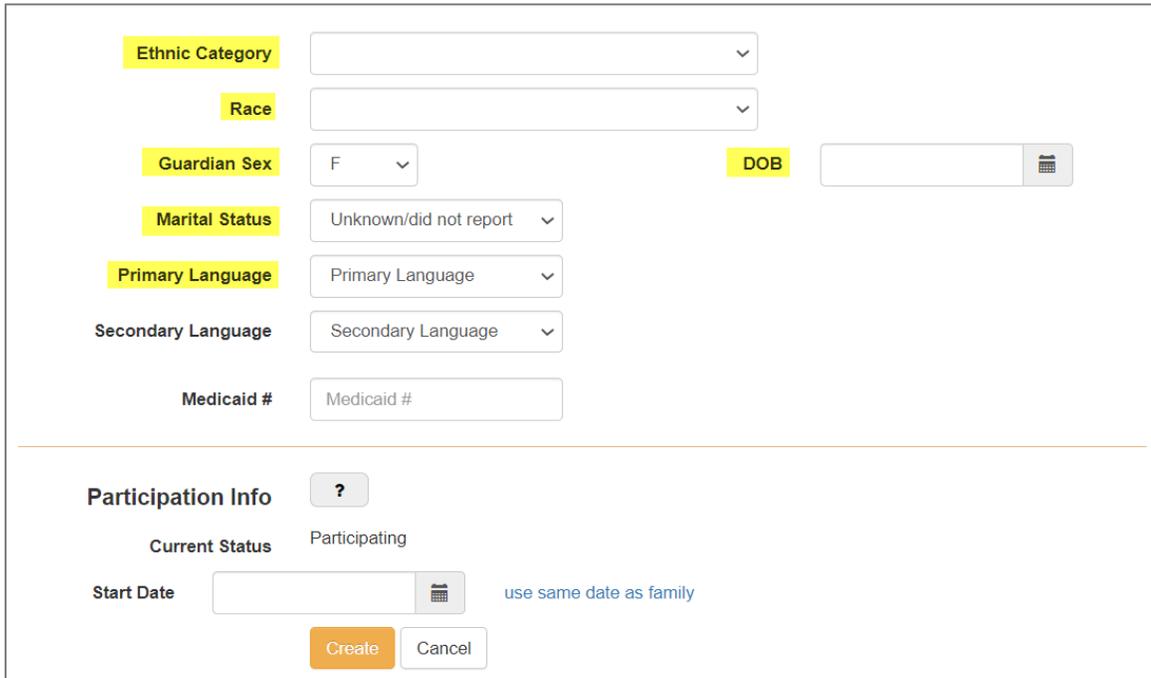
To enter an additional caregiver:
1. Navigate to the *Family Home* page by clicking on the "Families" link in the horizontal navigation bar and choosing the family from the drop-down menu.

2. Click on the "Add Guardian" link in the left side of the Guardians Entered table.

| Guardians Entered | | **+ Add Guardian** |

3. Complete the "Enter New Guardians" form. The highlighted fields are required by the HVSA. When finished, click "Create."

Note that the guardian's "Start Date" will most likely be the same as the family's.

The remaining caregiver demographic data is entered on a separate page in Visit Tracker: the Demographic/Health Info page. Information on this page is collected at enrollment and updated annually thereafter.
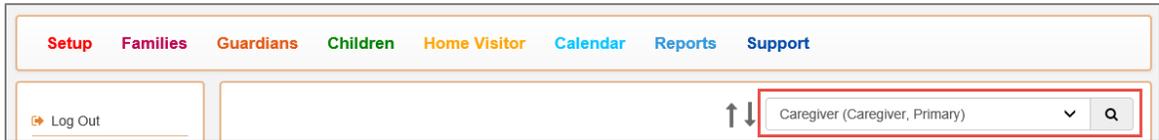
Demographic/Health Info

Includes questions about primary and additional caregivers, including:

- ☐ Household Income
- ☐ Guardian Employment Status
- ☐ Guardian Educational Attainment
- ☐ Guardian Housing Status
- ☐ Guardian Health Insurance
- ☐ MIECHV Priority Populations (MIECHV-funded families only)

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To enter guardian family and demographic and health information:

1. Navigate to the Family Home page by clicking on the "Families" link in the horizontal navigation bar and choosing the family from the drop-down menu.

2. Click on the "Demographic/Health" link in the vertical menu bar on the left-hand side of the page.

You'll see two sections under the Demographic Data header on this page:

1) **Family Demographics** – information in this section should be about the family as a whole, not individual guardians.

2) **Guardian Demographics** – information in this section should be specific to individual guardians.

Because demographic data is required for every caregiver entered into Visit Tracker, you'll need to add an item for each caregiver:

Use the "Guardian" drop down menu to indicate which caregiver's response you are entering:
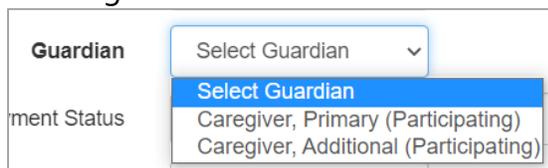
After adding each item, you'll see two items below that demographic's header:

| Date	Guardian	Employment Status	#hrs/wk	
5/23/2019	Primary Caregiver	Full Time	40	
5/23/2019	Additional Caregiver	Not employed	0	

To enter information on **Household Income:**

3. Click on the "Add Item" button next to Family Income History.

Family Income History	Add Item

4. Record the date the question was asked, the family's average monthly income, the number of individuals dependent on the income, and the family's income sources (optional).
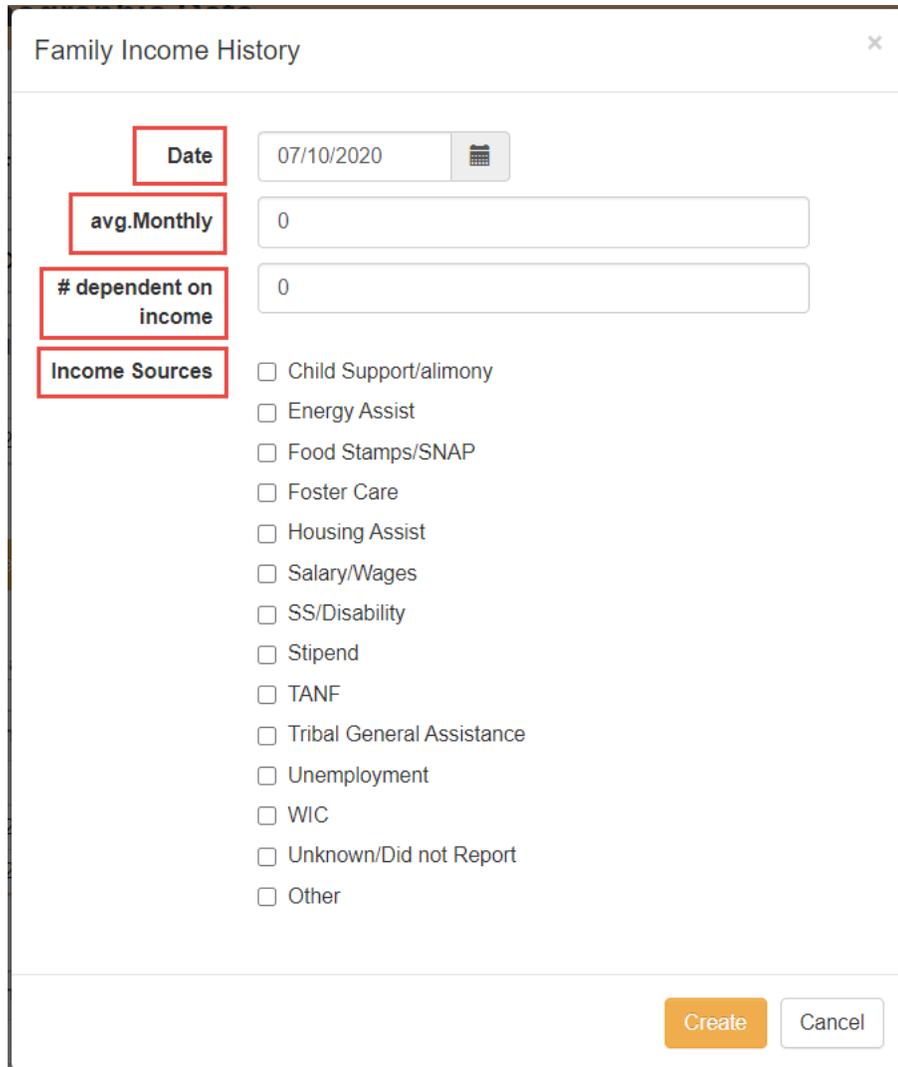
Family Income History   ✕

Date   07/10/2020   🗓

avg.Monthly   0

dependent on   0
income

Income Sources   ☐ Child Support/alimony
                    ☐ Energy Assist
                    ☐ Food Stamps/SNAP
                    ☐ Foster Care
                    ☐ Housing Assist
                    ☐ Salary/Wages
                    ☐ SS/Disability
                    ☐ Stipend
                    ☐ TANF
                    ☐ Tribal General Assistance
                    ☐ Unemployment
                    ☐ WIC
                    ☐ Unknown/Did not Report
                    ☐ Other

   Create   Cancel

The family's average monthly income should be the total amount earned by every member of the household regardless of whether or not the household members are related. All sources of income should be counted (not just wages). Similarly, every household member who relies on this income should be counted in the "# dependent on income" regardless of whether or not they are related.

While recording income sources is optional, you may want to record this information for families that receive TANF. This information is used to determine whether a family qualifies the LIA for an additional retention performance payment award.

5. When you're done, click the "Create" button at the bottom of the menu to save the information.

(MIECHV-funded families only) To enter information on **MIECHV Priority Populations:**

6. Click on the arrow next to "MIECHV Priority Population Characteristics" to expand the menu.

▶ MIECHV Priority Population Characteristics
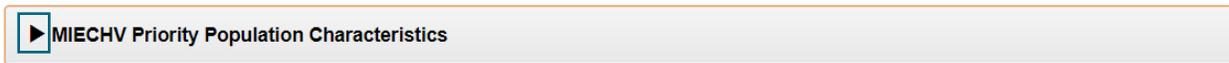
7. The first three fields are automatically populated based on information entered in other areas of Visit Tracker. Enter the family's response for the last 5 characteristics. For definitions, see the "HVSA Demographic Data Collection" document, which can be found in the "Enrollment and Demographic Characteristics" section of the Data Collection page on the DCYF Home Visiting website.

▼ MIECHV Priority Population Characteristics

Yes	No	Not Asked / Unknown	
⦿	○	○	Low income household (This field updates based on the family's latest income entry)
○	○	⦿	Someone in the household uses tobacco products in the home (This field does not update. It's based on the family's first Tobacco Use Survey entry at enrollment)
○	⦿	○	Household contains an enrollee who is pregnant and under age 21 (This field does not update. It's based on the guardian's age with a prenatal child at enrollment.)
○	○	⦿	Someone in the household has attained low student achievement or has a child with low student achievement
○	○	⦿	Household has a history of child abuse or neglect or has had interactions with child welfare services
○	○	⦿	Household has a child with developmental delays or disabilities
○	○	⦿	Household has a history of substance abuse or needs substance abuse treatment
○	○	⦿	Household includes individuals who are serving or formerly served in the US armed forces

Save

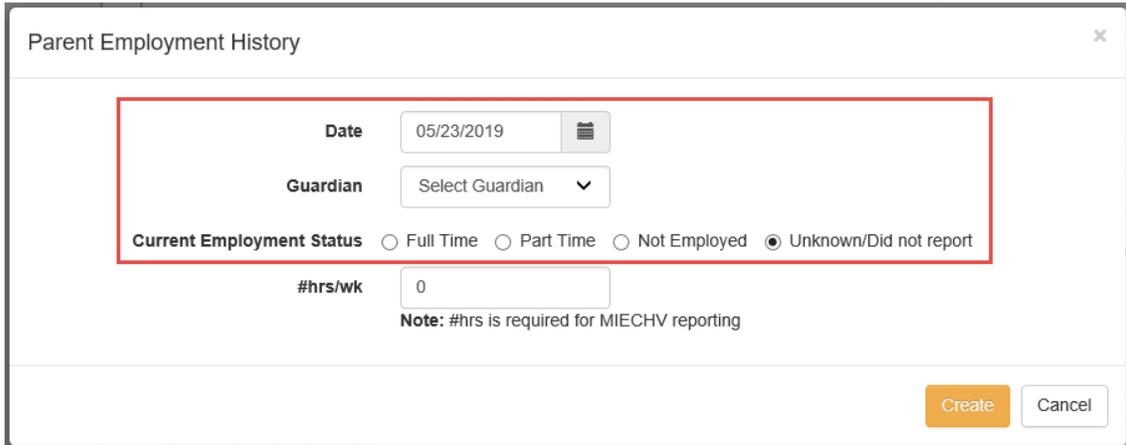Washington State Department of
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To enter information on **Guardian Employment:**

8. Click on the "Add Item" button next to Parent Employment History.

Parent Employment History	Add Item

9. Fill in the HVSA required fields: Date, Guardian, and Current Employment Status.

Parent Employment History ✕

| Date | 05/23/2019 📅 |
Guardian	Select Guardian ⌄
Current Employment Status	◯ Full Time ◯ Part Time ◯ Not Employed ⦿ Unknown/Did not report
#hrs/wk	0

Note: #hrs is required for MIECHV reporting

Create   Cancel

10. Click the "Create" button at the bottom of the menu to save the information.
11. Repeat for any additional guardians enrolled in the family.

To enter information on **Guardian Educational Attainment:**

12. Click on the "Add Item" button next to Parent Education History.

13. Fill out the form. Fields outlined in red are required for all HVSA families. Fields outlined in blue are required for MIECHV-funded families only.

Parent Education History ✕
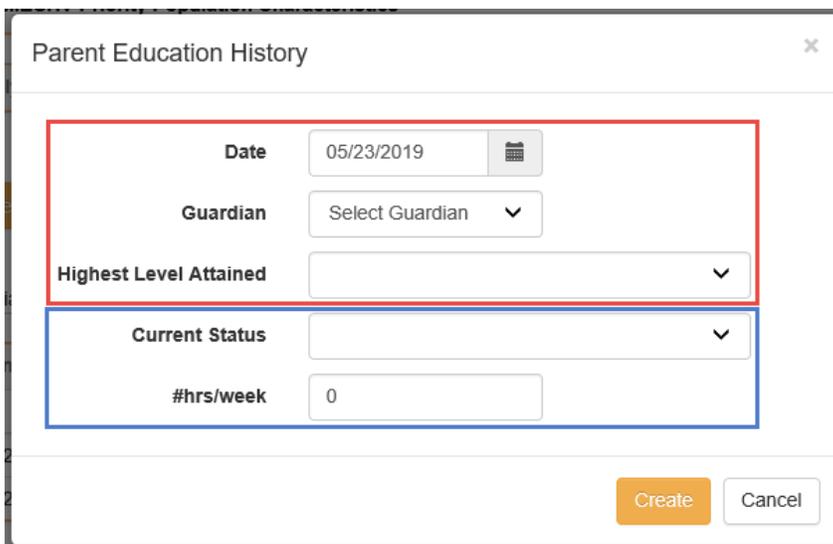
Date	05/23/2019 📅
Guardian	Select Guardian ⌄
Highest Level Attained	⌄
Current Status	⌄
#hrs/week	0

Create   Cancel

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14. Click the "Create" button at the bottom of the menu to save the information.
15. Repeat for any additional guardians enrolled in the family.

To enter information on **Housing Status:**

16. Click on the "Add Item" button next to Parent Housing Status.

17. Fill out the form. All fields in this menu are required for all HVSA funded families.
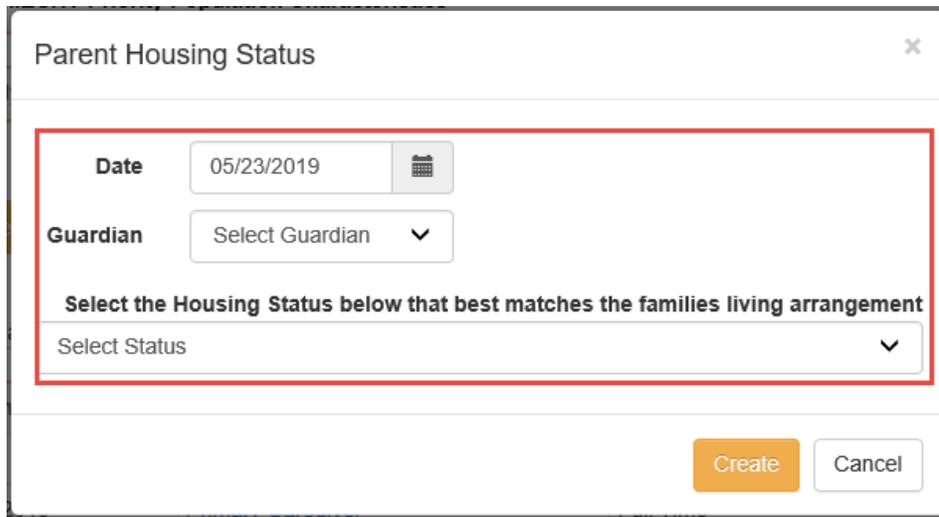
18. Click the "Create" button at the bottom of the menu to save the information.
19. Repeat for any additional guardians enrolled in the family.

To enter information on **Health Insurance Status**:

20. Under the Health Info header, click on the "Add Item" button next to Insurance History.

21. Fill out the form. Fields outlined in red are required for all HVSA families. Fields outlined in blue are required for MIECHV-funded families.

22. Click the "Create" button at the bottom of the menu to save the information.
23. Repeat for any additional guardians enrolled in the family.

To update caregiver demographic data:

Demographic data is required to be collected **at enrollment and updated annually thereafter**. When updating this information on the *Demographic/Health Info* page, it is important to click "Add Item" instead of editing the existing item. Adding a new item retains demographic information collected previously, allowing your program and the HVSA to look at changes in demographic characteristics over time. After adding a new item, an additional row will be included in the corresponding table on the *Demographic/Health Info* page.

If a guardian's marital status has changed since you last entered data, this information can be updated on the Guardian Data page.

Next, you'll need to enter child information into Visit Tracker. You may enter multiple children per family including born and unborn children.

Add Child Form

Includes questions about born children, including:

☐ Date of Birth
☐ Ethnicity
☐ Race

☐ Gender
☐ Diagnosed developmental delay status

To enter information for a child that was already born at enrollment:

1. Navigate to the *Family Home* page by clicking on the "Families" link in the horizontal navigation bar and choosing the family from the drop down menu.
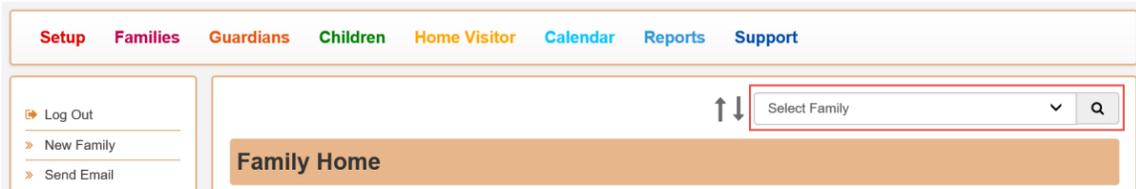
2. Scroll down to find the "Children Entered" section, and choose "+Add Child."

3. Complete the form with the child's enrollment and demographic information. HVSA-required fields are outlined below. Once complete, click "Create."

Note that a child's enrollment date may differ from their family's enrollment date. Unless the child actually enrolled later than the family, we recommend setting the child's enrollment date to match the family's enrollment date by clicking the "use same date as family" link.
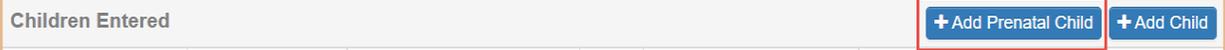
Add Prenatal Child

Includes questions about prenatal children, including:
☐ Due date

To enter information for a child that was not yet born at enrollment:

1. On the Family Home page, find the "Children Entered" section and choose "+Add Prenatal Child."

2. The only HVSA-required field on this form is Due Date. When finished filling out the form, click "Create."

Note that a prenatal child's enrollment date may differ from their family's enrollment date. In general, we recommend setting the child's enrollment date to match the family's enrollment date by clicking the "use same date as family" link.

Finally, the remaining child demographic/health data is entered on a separate page in Visit Tracker: the Child Health Info page. Data entered on this page applies to born children.
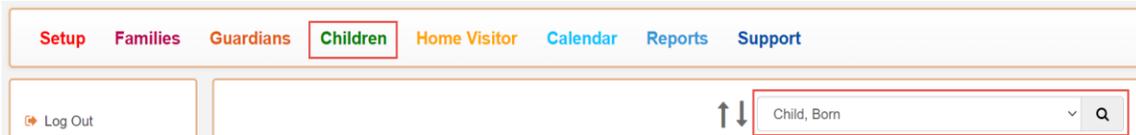
Child Health Info Form

**Includes questions about born children at enrollment, including:**

☐ Diagnosed developmental delays
☐ Health Insurance Status
☐ Usual Source of Medical Care
☐ Usual Source of Dental Care (MIECHV only)

To enter additional child health information:

1. Click on "Children" in the top horizontal menu, and choose the child from the drop down menu.

2. While on either the child's data page, you'll see a "Health Info" link in the left-hand vertical menu bar. Click the "Health Info" link.
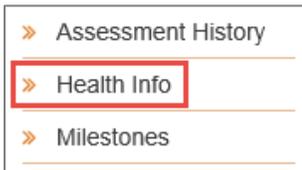
To enter information on child **Diagnosed Developmental Delays:**

3. Click on the "Add Item" button next to Delays, disabilities, and conditions.

4. Complete the required fields highlighted in red below and click "Create." Note: This information may already have been entered when the child was added to Visit Tracker.

To enter information on the child's **Health Insurance Status:**

5. Click on the "Add Item" button next to Insurance History.

6. Record the date the question was asked, the child's current health insurance status, and click "Create."
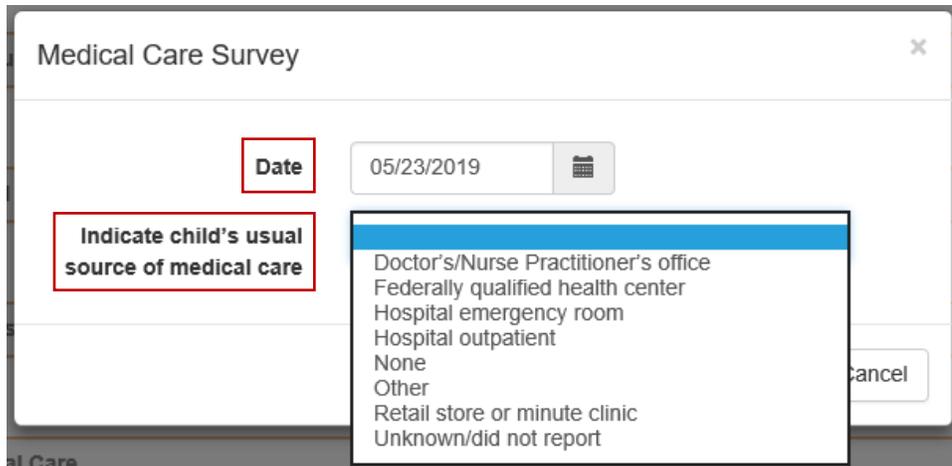
To enter information on **Usual Source of Medical Care:**

7. Click on the "Add Item" button next to Medical Care.

8. Fill in the data collection date, the child's usual source of medical care, and click "Create."
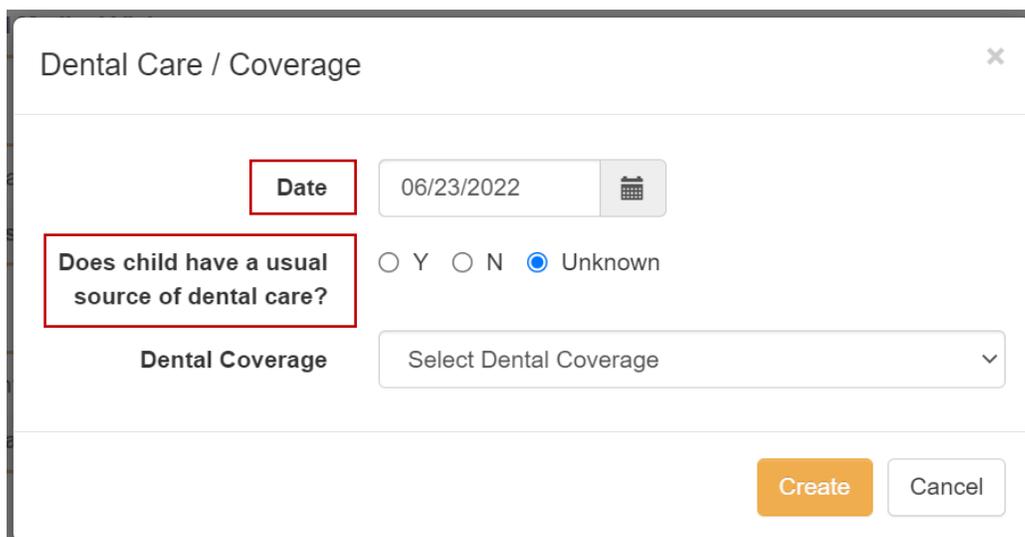

To enter information on **Usual Source of Dental Care:**

9. Click on the "Add Item" button next to Dental Care/Coverage.

10. Fill in the data collection date, whether or not the child has a usual source of dental care, and click "Create."

To update a child's demographic data:

Note that most child health information is required to be updated annually. When updating this information, it is important to click **"Add Item"** instead of editing an existing item to maintain a history. Adding an item will create an additional row instead of overwriting the previous entry.

Dental Care / Coverage			Add Item
Date	**Dental Care**	**Coverage**	
6/2/2022	Yes: Has a usual source of dental care	Title XIX (Medicaid)	✏️ 🗑️
6/23/2021	No: Does not have a usual source of dental care	No insurance coverage	✏️ 🗑️

Because Visit Tracker makes frequent updates, some information in this document may be out of date. If you notice a necessary update or have any questions about this guidance, please reach out to homevisiting@doh.wa.gov.