



ONE-STEP GUIDELINES



Healthy
Families NY

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These guidelines provide information regarding the One-Step Enrollment process from Screen to FROG.

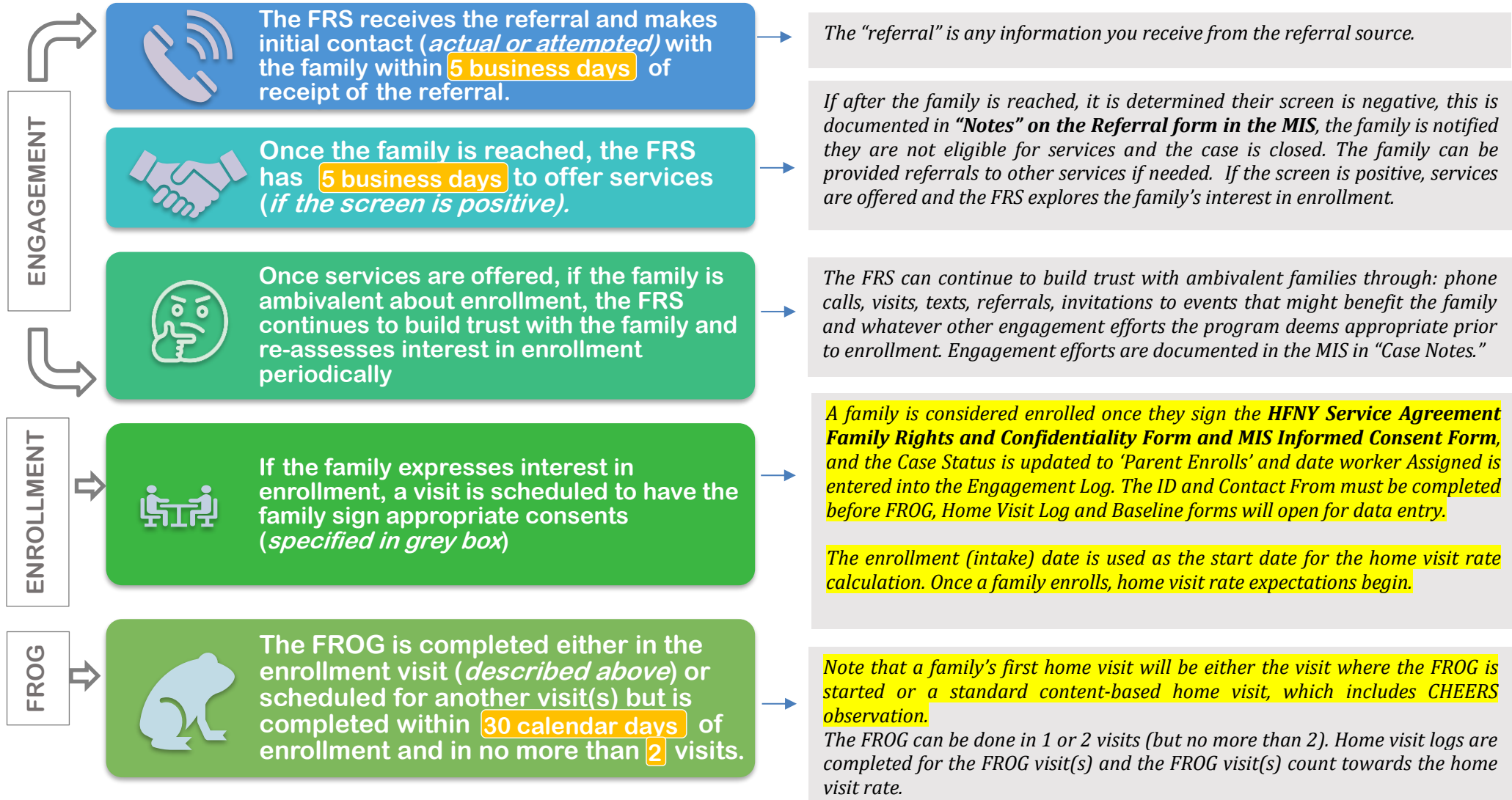
- **The One-Step Enrollment Process** (*This provides a step-by-step guide for what one-step enrollment might look like from "Screen to FROG." It also includes helpful tips, tools and things to consider at each stage*)
- **What Happens After Enrollment for Dual Role Programs?** (*This provides specific guidance to programs whose home visitors perform both the FRS and FSS roles, making their home visitors "dual role."*)
- **What Happens After Enrollment for Single Role Programs?** (*This provides specific guidance to programs continuing to keep their FSS and FRS roles separate, keeping their home visitors as "single role."*)
- **MIS Referral to Screen Flowchart** (*The flowchart below shows what the engagement and data entry process entails from referral to screen*)
- **MIS Case Home Page** (*This screenshot provides a layout of what of a sample case home page in the MIS will look like after the switch to one-step*)
- **One Step MIS Documentation** (*This chart specifies the MIS forms that will be done from Screen to Intake as well as the order of form completion "at a glance" and important "to-dos" for each step of the MIS form completion process*)

We have also recorded several webinars that provide information on the technical aspects of the switch to One-Step:

WATCH THE WEBINARS

THE ONE-STEP ENROLLMENT PROCESS

WHAT MIGHT A “ONE-STEP” ENROLLMENT PROCESS LOOK LIKE?



NOTE: This is **just one example** of what the enrollment process might look like. Based on each programs unique staffing patterns and procedures, the process may look different (e.g., programs with *dually trained* staff could provide a content-based home visit PRIOR to the FROG visit, if all home visit criteria are met).

WHAT HAPPENS AFTER FROG FOR “DUAL ROLE” PROGRAMS?

“DUAL ROLE” MEANS THE SAME HOME VISITOR PERFORMS BOTH ASSESSMENT (FRS) AND INTENSIVE HOME VISITING ACTIVITIES (FSS)*



The assigned home visitor schedules weekly home visits with the family



If the home visitor who completed the FROG will be conducting weekly home visits with the family, they can schedule the next home visit at the end of the FROG visit(s) while the actions in the 3 boxes below are done concurrently. However, even in a dual role program a decision might still be made to transfer the family to another home visitor for weekly visits if that home visitor is a better fit for the family. Sometimes this determination is made before the FROG visit but at other times, something may come up during the FROG visit that causes the program to re-think a home visitor assignment. If that is the case, refer to “What Happens after the FROG for “Single Role” Programs” below.



The assigned home visitor completes the FROG narrative and relevant data forms in the MIS **2 business days** of the FROG visit



Refer to “One Step MIS Documentation” graphic included below for a list of forms to complete in the MIS. If it took 2 visits to complete the FROG, the FROG date in the MIS will be the date the FROG was completed (the date of visit 2), not the date it was started.



The Supervisor reviews, approves and finalizes the FROG within **3 business days** of FROG submission



The assigned home visitor and Supervisor complete the Service Plan

*Dual role home visitors refer to any staff who are serving both FRS (assessment) and FSS (intensive home visiting) roles.

WHAT HAPPENS AFTER FROG FOR “SINGLE ROLE” PROGRAMS?

“SINGLE ROLE” MEANS THE FSS AND FRS ROLES ARE PERFORMED BY DIFFERENT HOME VISITORS



The FRS informs the family of next steps

The FRS can offer the family any appropriate referrals and let the family know that a Family Support Specialist will be reaching out to begin working with them.



The FRS completes the FROG narrative and relevant data forms in the MIS within **2 business days** of the FROG visit

*Refer to “**One Step MIS Documentation**” graphic included below for a list of forms the FRS completes in the MIS. If it took 2 visits to complete the FROG, the FROG date in the MIS will be the date the FROG was completed (the date of visit 2), not the date it was started.*



The FRS Supervisor reviews, approves and finalizes the FROG and collaborates with the FSS Supervisor to assign an FSS within **3 business days** of FROG submission

*The FSS that will work with the family can be **selected before OR after the FROG visit**. Programs can decide how they would like to handle the warm transfer process and what level of discussion they would like to have prior to assignment of the FSS in the MIS.*



The FSS engages the family and schedules weekly home visits

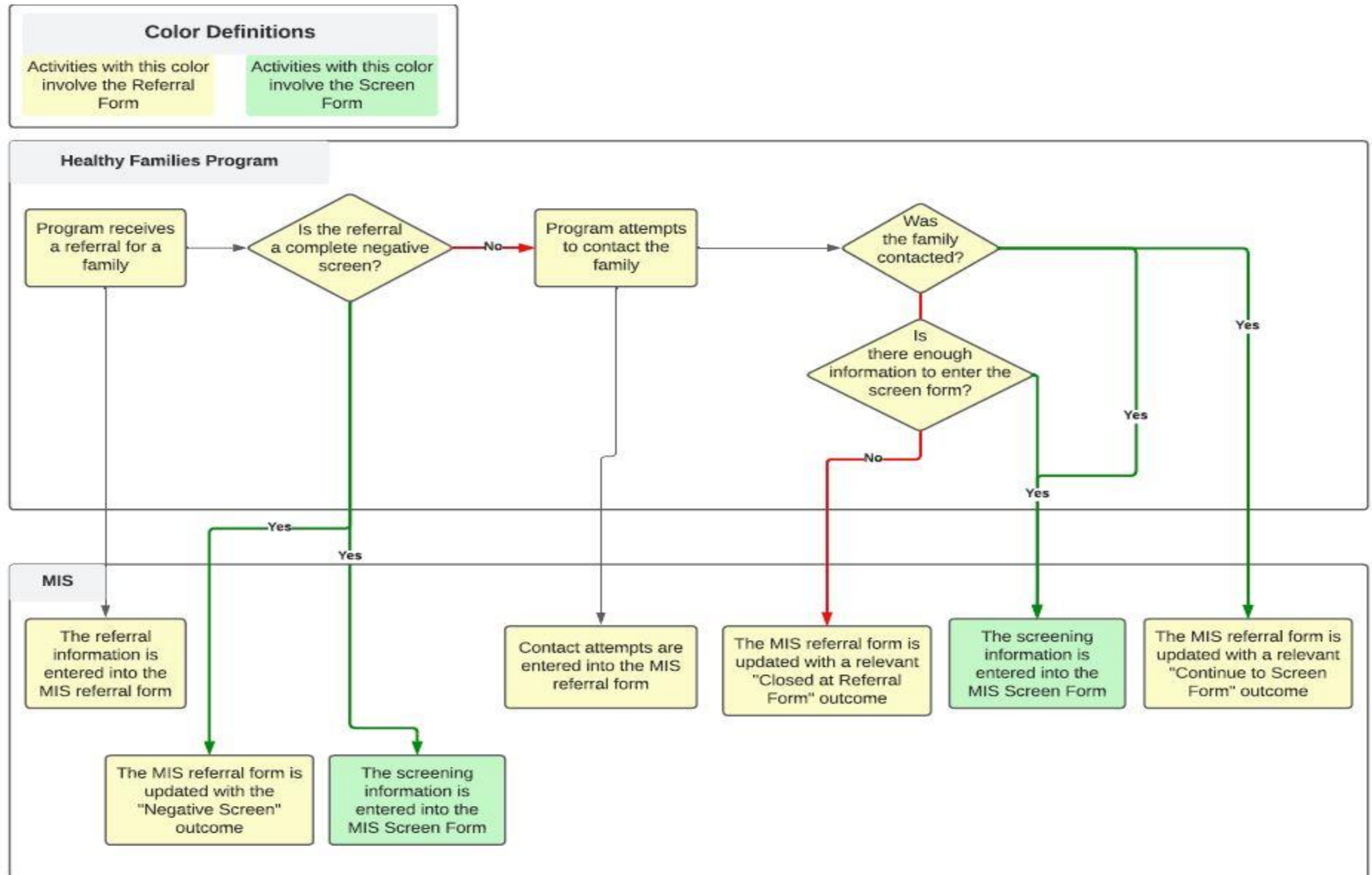


The home visitor and supervisor complete/review the Service Plan

Some programs may choose to have the FRS with their Supervisor complete the initial Service plan. If this is the case, the assigned FSS should review FROG narratives and Service Plan to identify any additional area to be included.

MIS REFERRAL TO SCREEN FLOWCHART

The flowchart below shows what the engagement and data entry process from the time a referral is received to the time the screen is entered into the MIS.



MIS CASE HOME PAGE

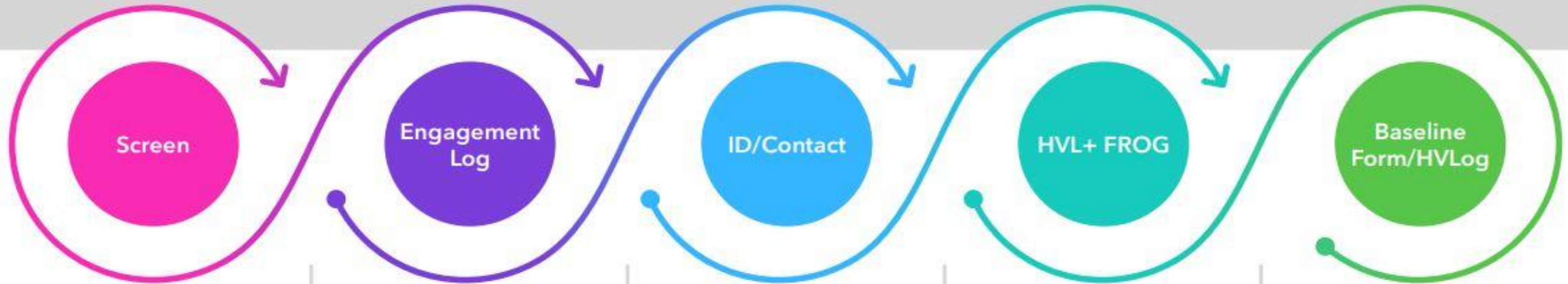
The screen shot below shows what the case home page looks like in the MIS, with the numbers in the circles representing the order in which each form will be completed in the MIS. It serves as a companion guide to the “One Step MIS Documentation” form.

The screenshot displays the MIS Case Home Page interface. At the top, there is a navigation bar with a user profile icon, a search bar labeled 'Search Cases', and links for '+ New Screen', 'Reports', 'Susan Moore', 'Settings', and 'Help and Docs'. Below this is a horizontal menu with tabs: 'Basic Information', 'Case Filters', 'Forms' (selected), 'Case Notes', 'Case Documents', 'Medical Providers', and 'Family Goal Plans/Transition Plans'. The main content area is divided into three columns: 'Pre-Enrollment', 'After Enrollment', and 'Post Target Child ID'. The 'Pre-Enrollment' column contains a 'Referral' form. The 'After Enrollment' column contains a list of forms with completion counts in circles: 'Identification and Contact Information' (1), 'FROG' (0), 'Home Visit Logs' (1), 'PC1 Medical Information' (0), 'Father / Father Figure Identification Information' (0), 'Baseline Form' (0), 'Service Plan' (0), 'Target Child Information and Birth Outcomes' (0), and 'Discharge' (0). The 'Post Target Child ID' column contains a list of forms with completion counts in circles: 'Target Child Medical Information' (0), 'Parenting Stress Index' (0), 'PHQ9' (0), 'ASQ Score Sheet' (0), 'ASQ Social-Emotional Score Sheet' (0), 'Follow-Up' (0), and 'CHEERS Check-Ins' (0). Red circles with numbers 4, 5, 6, and 7 are overlaid on the 'After Enrollment' column, indicating the completion order: 4 for 'Identification and Contact Information', 5 for 'FROG', 6 for 'Home Visit Logs', and 7 for 'Baseline Form'. A green arrow points from the 'Home Visit Logs' form (6) to a text box at the bottom right.

Form Category	Form Name	Completion Count
Pre-Enrollment	Referral	
After Enrollment	Identification and Contact Information	1
	FROG	0
	Home Visit Logs	1
	PC1 Medical Information	0
	Father / Father Figure Identification Information	0
	Baseline Form	0
	Service Plan	0
	Target Child Information and Birth Outcomes	0
	Discharge	
Post Target Child ID	Target Child Medical Information	0
	Parenting Stress Index	0
	PHQ9	0
	ASQ Score Sheet	0
	ASQ Social-Emotional Score Sheet	0
	Follow-Up	0
	CHEERS Check-Ins	0

*Remember that the FROG visit(s) will now be added to HV Logs (in addition to the regular FROG form). Refer to the next page “**One-Step MIS Documentation**” for more information.*

ONE STEP MIS DOCUMENTATION



HFNY Policy 1-2 A

Families with a positive screen in MIS are eligible to enroll for services.

TO DO:

- Review referrals, begin attempts to contact family
- Determine eligibility, assign staff and enter into MIS

THINGS TO REMEMBER:

Referrals and their outcomes are monitored at least quarterly and used to develop and implement strategies for quality improvement (see BPS 1-2.B and 1-2.C)
If approved by CA, program may implement CWP

HFNY Policy 3-2 A

Case Notes are used to record contacts: phone calls, texts, mailings, deliveries, engagement visits.

TO DO:

Pre-Enrollment engagement activities (see BPS 3-2.B)

- Describe program services
- Build family's interest
- Begin to establish a relationship and build trust

THINGS TO REMEMBER:

The assigned worker should use their professional judgment when gauging families' genuine interest in enrolling for HFNY services, partnering with families to complete the enrollment process

HFNY Policy 1-2A & 3-1A

Enrollment occurs when forms are signed and the family consents to services. Enrollment occurs before FROG.

TO DO:

Sign paperwork once the family has agreed to services

- Families sign the Service Agreement, Family Rights and Confidentiality, and MIS Informed Consent (see BPS 3-1B)

THINGS TO REMEMBER:

Date on Engagement Log = Enrollment date

HFNY Policy 1-3 A 2-1 A & 4-1 A

1st home visit is the first visit that occurs on/after enrollment prenatally or within 3 months (24m if CWP).

TO DO:

Use the Home Visit Log to document FROG, ideally completed in one visit but no more than 2. Check FROG box on Visit

Information tab; write comments on the Program Activity Tab; and enter next visit scheduled (7 days later) date on the Parent Response Tab

Complete FROG Form (use completion date)

Assign worker if different to the one that conducted the FROG

THINGS TO REMEMBER:

If FROG takes more than one visit, an additional HVL must be entered (frog icon must be clicked)

HFNY Policy 1-3 A & 3-3 A

Families are offered weekly visits at the start of services and services are offered long term (3 to 5 years).

TO DO:

Complete Baseline Form (old Intake Form)

Use Home Visit Log to record all visits (CHEERS, curriculum, etc.)

THINGS TO REMEMBER:

Families who have received at least one home visit (post enrollment) are offered Creative Outreach if visits are interrupted

Use Case Notes for additional outreach efforts

Prior to the switch to One-Step Enrollment this was referred to as the "intake date"