Family Needs

After a Family Need has been determined, appropriate referrals should be given to assist the family. Each referral given should be recorded into ChildPlus. At the end of the Program Year, the Program Information Report (PIR) is generated from the information contained within ChildPlus. The Family Services information in the PIR is generated from the Family Need referrals entered into Childplus. The Family Need event documents the family’s Need and the ultimate Outcome under the Event portion of the record and documents the details of the service provision under the Action(s). If a family is ultimately referred to more than one community resource prior to their need being satisfied, a separate Action should be opened for each community resource, thereby allowing each community resource to be tracked separately.

**Entering a New Family Need**

New Family Needs are entered into ChildPlus as follows:

1. Navigate to the child’s Family Services area.
2. Click on **Add Event**. This opens a blank event template.
3. Select an **Event Type** of Family Need (black arrow below).
4. Fill in the yellow-shaded fields shown below as follows:
   a. Enter the date of the Family Need referral into the **Initial Date** field.
   b. Enter a brief description of the referral into the **Description** field.
   c. Select the **Service Area** that best fits the referral from the list of options.
      i. If you are providing a Food Basket to the family, select a **Service Area** of Food and an **Issue** of Food Basket.
      ii. If you are providing toys under the Toys for Tots program, select a **Service Area** of Income Support and an **Issue** of Toys for Tots.
      iii. If you are providing school supplies under the Ready to Learn program, select a **Service Area** of Income Support and an **Issue** of Ready to Learn.
   d. Select your name from the list of staff members under **Agency Worker** (this field may already be prepopulated).
   e. Enter the expected completion date of the referral into the **Closure Expected** field.
   f. Select an appropriate **Progress** code as follows:
      i. If a written referral is being provided, select **Initiated** from the list of options.
      ii. If a written referral was provided and the family has started receiving services, select **In Progress** from the list of options.
      iii. If the service has already been provided, select **Completed**.

Date: 06/29/2017
g. Click on the clock icon (blue arrow below) and enter a more detailed description of the referral and its need into the Event Notes field.

5. Scroll down to the Action area in the event template and click on Add Action (red arrow below). This opens a blank Action template.
6. Fill in the yellow-shaded fields as shown below:
   
a. Select an **Action Type** of **Referral**.

b. Enter the date of the referral into the **Action Date** field.

c. Select the community resource the family is being referred to from the list provided under the **Referred To** field. If the service is being provided by Head Start staff (e.g.: Toys for Tots, Ready to Learn, Food Basket), select **HCAP** for the appropriate district center (e.g.: HCAP-Leahi) from the list of Community Resources.

d. Select a **Referral Type** of **Written**.

e. Enter a brief description of the service expected or provided in the **Description** field.

f. Set the **Status** to **Initiated**, **In Progress**, or **Completed**, as appropriate. Statuses of Initiated and In Progress will generate an Alert on your Calendar.

g. If the Action **Status** is In Progress or Completed, click on the **clock** icon (blue arrow below) and enter update or closure notes for the actual service provision into the **Action Notes** field.

7. When you are complete, click on **Save Changes**.
**Updating Family Need Referrals**

Your Calendars should be generating Alerts to remind you which Family Need referrals are still open. After you have followed-up with the family, the referral event needs to be updated in ChildPlus. This update is performed as follows:

1. Navigate to the appropriate Family Need in the list of Family Service Events (red arrow below). Note that clicking on the link contained within the Calendars alert will take you directly to the correct event.

2. Update the yellow-shaded fields of the Event as shown below:
   
a. Update the **Closure Expected** field to, as needed.
   
b. Select a **Progress** code of **In Progress** from the list of options.
3. Scroll down to the Action and update the yellow-shaded fields as shown below:
   a. Enter today’s date into the **Action Date** field. This field should always reflect when the latest update was made to this record.
   b. Select a **Status** code of **In Progress** from the list of options.
   c. Click on the **clock** icon (blue arrow below) and enter update notes for the actual service provision into the **Action Notes** field.

4. When you are complete with the referral update process, click on **Save Changes**.
**Closing Family Need Referrals**

Your Calendars should be generating Alerts to remind you which Family Need referrals are still open. After you have followed-up with the family and determined that the referral has been completed, the referral event needs to be closed in ChildPlus. This is performed as follows:

1. Navigate to the appropriate Family Need in the list of Family Service Events (red arrow below). Note that clicking on the link contained within the Calendars alert will take you directly to the correct event.

2. Update the yellow-shaded fields of the Event shown below as follows:
   a. Select a **Progress** code of **Completed** from the list of options. In the event the family decided to stop the referral process, or dropped out of the program before completing the referral, the following **Progress** codes can be used:
      i. **Dropped Before Completed**,  
      ii. **Stopped: No Longer Relevant**, or  
      iii. **Stopped: Parent Choice**
   b. Enter the actual referral completion date into the **Date Closed** field.
   c. Select an appropriate **Result** from the list of options. If the service was fully provided, select **Met Fully**.
3. Scroll down to the Action and fill in the yellow-shaded fields as follows:
   a. Enter the referral completion date (Date Closed from above) into the **Action Date** field.
   b. Select the same **Status** as used in the **Progress** field above (this will remove the Alert from your Calendars).
   c. Click on the **clock** icon (blue arrow below) and enter closure notes in the **Action Notes** field.

<table>
<thead>
<tr>
<th>Action Date</th>
<th>Action Type</th>
<th>Description</th>
<th>Status</th>
<th>Case Worker</th>
<th>Referred To</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>7/28/2017</td>
<td>Referral</td>
<td>Food Box</td>
<td>Completed</td>
<td>Wu, Nick</td>
<td>Abinsayh</td>
<td>On</td>
</tr>
</tbody>
</table>

**Action Notes**

- **7/28/2017 9:52 AM - Nick Wu**
  Enter referral closure notes.
- **6/28/2017 2:34 PM - Nick Wu**
4. Click on the **Family Services Information** tab.

5. Under the **Services Received** column, enter a **Yes** into the field (if not already marked Yes) for the **Service Area** of the referral just closed.

6. Click on **Save Changes** when you are complete.