

Creating a Home Visit Log

Roles that Have Access: Home Visitor

When documenting a Home Visit in Hubbe, the Home Visitor must create a “Home Visit Log.” This virtual record tracks all of the essential information related to a single home visit with a family. This instruction guide will walk through how to create a Home Visit Log in Hubbe.

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Creating a Home Visit Log

For Home Visitors, there are two locations inside of the system that a Home Visit Log can be created from. A Home Visit Log can be created from the Home Visitor landing page using the calendar, or it can be created from a **Family** record. We will walk you through both of these locations in the subsequent sections.

Creating a Home Visit from the Calendar

When logging into the system as a Home Visitor, you will notice that on your landing page there is a Calendar. This calendar is to document all of the Home Visits that are completed in a single month. The calendar provides a simplified snapshot of all of the Home Visiting that is done for a single Home Visitor.

In order to create a new Home Visit Log from the calendar, click on the grapefruit-colored button at the top of the page labeled “+ Home Visits.”



This will open the “Create Home Visit” modal, as shown below:

Create Home Visit

Home Visit ID * Status *

Visit Date * Start Time * End Time *

Location

Available Families *

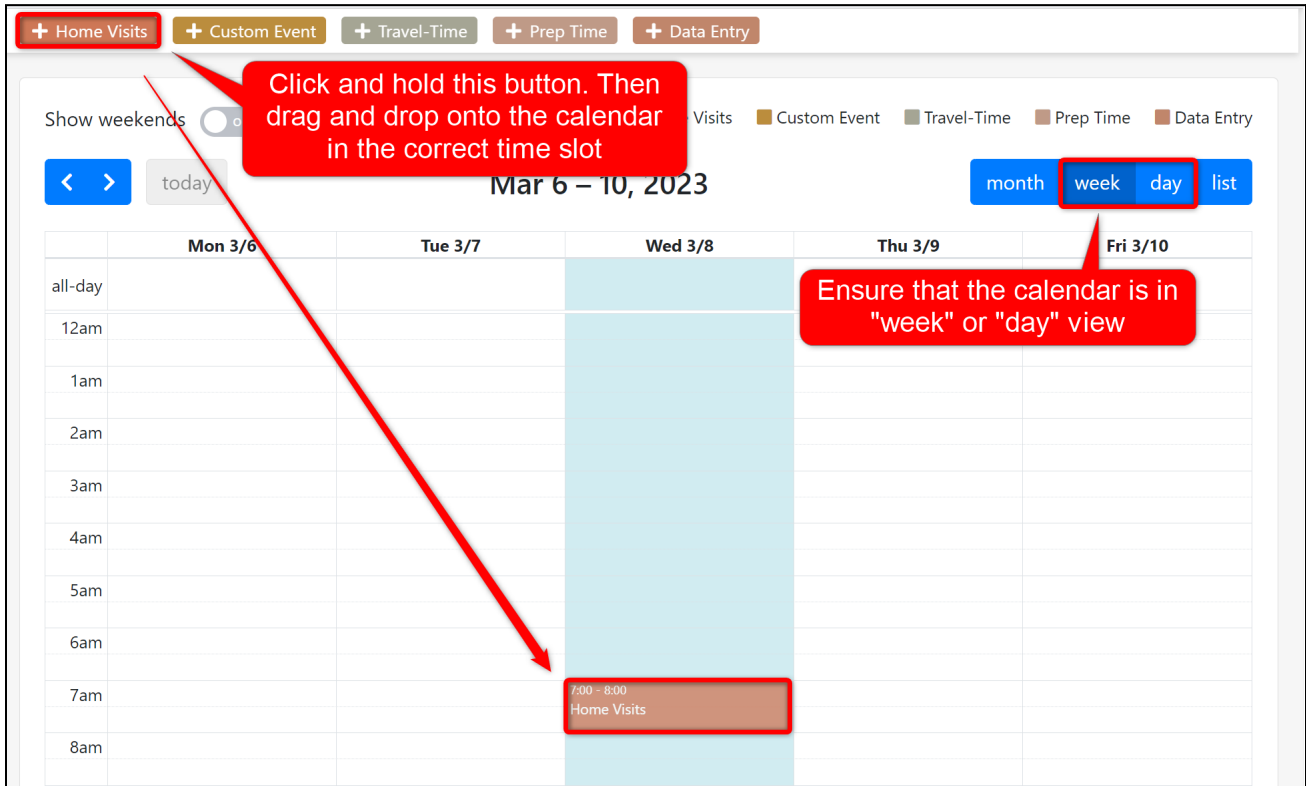
Select Home Visitors

Home Visit Synopsis *

Purpose of Visit *

2

Alternatively, if you already know the exact date and time of the **Home Visit** record that you wish to create, you can also drag-and-drop the “+ Home Visits” button directly onto the calendar to populate the record. Just make sure that the calendar is either in “Week” or “Day” mode, as shown below:



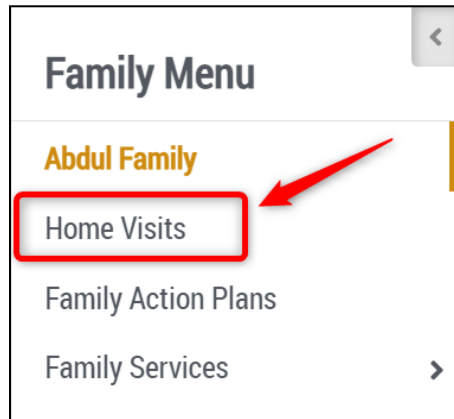
This will open the “Create Home Visit” modal, with the date and time pre-populated, as shown below:

The image shows a "Create Home Visit" modal form. It has a title bar with a close button. The form contains several fields: "Home Visit ID *" with the value "HV17274197"; "Status *" with a dropdown menu showing "Draft"; "Visit Date *" with a date picker showing "03/08/2023"; "Start Time *" with a time picker showing "07:00 AM"; "End Time *" with a time picker showing "08:00 AM"; "Location" with an empty text input; "Available Families *" with a dropdown menu; "Select Home Visitors" with a list containing "x Hannah Valentine"; "Home Visit Synopsis *" with a large text area; and "Purpose of Visit *" with a dropdown menu. At the bottom right, there are "Cancel" and "Save" buttons.

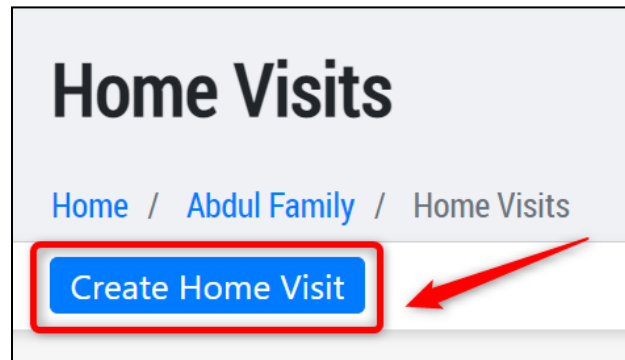
3 Now that you have utilized one of the methods shown in steps 1 or 2 to generate the “Create Home Visit” modal, you are ready to begin creating a Home Visit Log. Scroll down to the “Entering Necessary Home Visit Data” section below for the next steps.

Creating a Home Visit from the Family Record

In addition to creating a **Home Visit** record from your landing page, you can also create a Home Visit Log directly from a family record as well. From a family record, click on the “Home Visits” menu item to view the **Home Visit** grid for the family.



2 From this page, you can begin creating the **Home Visit** record by clicking on the blue “Create Home Visit” button at the top of the page.



This will open up the “Create Home Visit” modal, with the “Available Families” field pre-populated as shown below:

Create Home Visit

Home Visit ID * HV14128745

Status * Draft

Visit Date * mm/dd/yyyy

Start Time * --:--:--

End Time * --:--:--

Location

Available Families * Abdul Family

Select Home Visitors

x Hannah Valentine

Home Visit Synopsis *

Purpose of Visit * ⓘ

Cancel Save

3 Now that you have utilized one of the methods shown in steps 1 or 2 to generate the “Create Home Visit” modal, you are ready to begin creating the Home Visit Log. Scroll down to the “Entering Necessary Home Visit Data” section below for the next steps.

Entering Necessary Home Visit Data

When you are creating a Home Visit for a family, there is the option to document a plethora of information. Depending on the protocols of your organization, you may only need to fill out *some* of the fields on the **Home Visit** record. If you are unaware of the protocols in your organization, we will attempt to highlight the most important fields that have implications for reporting. These are the fields that you want to ensure that you fill out at the very least.

Upon creating a Home Visit Log, a modal will appear. Within this modal, you can enter some **initial** information about the Home Visit. Once the initial data is collected, you will be directed to the Home Visit Log to fill out more information.

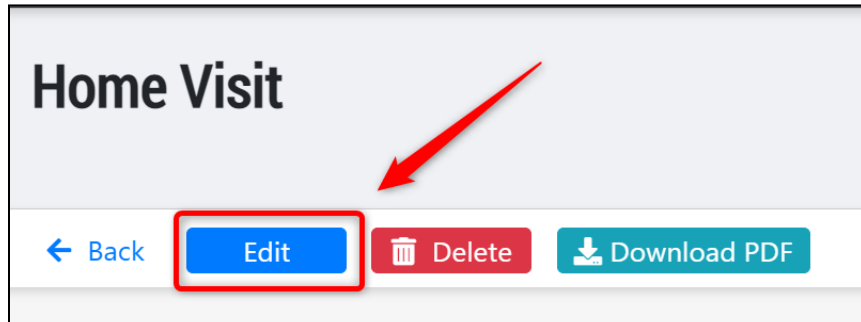
See the image below for which of the data fields is required when creating a Home Visit Log. Once you've completed these fields, click on the blue "Save" button to continue to the Home Visit Log.

The image shows a 'Create Home Visit' modal form with several fields highlighted by red boxes. The fields are: Home Visit ID (HV14128745), Status (Complete/Received), Visit Date (03/01/2023), Start Time (09:00 AM), End Time (10:00 AM), Location (Abdul Household), Available Families (Abdul Family), Select Home Visitors (Hannah Valentine), Home Visit Synopsis (empty), and Purpose of Visit (Parents As Teachers Educational Visit). The 'Save' button is blue, and the 'Cancel' button is white.

Field	Value
Home Visit ID *	HV14128745
Status *	Complete/Received
Visit Date *	03/01/2023
Start Time *	09:00 AM
End Time *	10:00 AM
Location	Abdul Household
Available Families *	Abdul Family
Select Home Visitors	x Hannah Valentine
Home Visit Synopsis *	
Purpose of Visit * ⓘ	Parents As Teachers Educational Visit

2

You can now enter the rest of the information on the **Home Visit** record. Click on the blue “Edit” button to continue entering information about the visit.



3

The top section of the Home Visit Log has a lot of important fields about the type of home visit. For the purposes of reporting, ensure that at the **very least** the following fields are filled out:

- Visit Date
- Visit Status
- Home Visit Program

A screenshot of a 'Home Visit' form. The form is divided into several sections. The 'Home Visit ID' field contains 'HV14128746'. The 'Visit Status' dropdown menu is set to 'Completed'. The 'Home Visit Program' dropdown menu is set to 'AG100 - CalWORKS Home Visiting Program'. The 'Visit Date' field is highlighted with a red box and contains '3/1/2023' with a time range of '09:00 AM - 10:00 AM'. The 'Purpose of Visit' is 'Parents As Teachers Educational Visit'. The 'Method Of Home Visit' is 'In-Home Visit'. The 'Supervisor Staff' field is empty. At the bottom, there is a section for 'Program Models' with a '+ Add' button, and a section for 'Parents as Teachers (PAT)' with a sub-item 'Child and Family Development'.

4

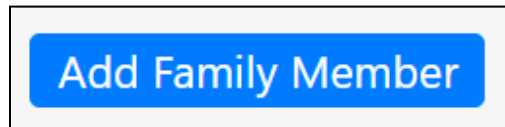
Beneath those fields are more fields that can help track useful information about the visit. From a reporting standpoint, none of these fields are required but may be helpful for your internal organization’s tracking purposes.

The screenshot shows a form with the following sections:

- Location:** A text input field containing "Abdul Household".
- Visit Category (Internal):** A dropdown menu with a pencil icon for editing.
- Internal Notes:** A section with a yellow square icon and "(0)" indicating zero notes.
- Home Visit Synopsis:** A large text area containing "Initial Visit."
- Home Visit Staff:** A section with a plus icon and a sub-label "Home Visitor" below it.

5

The next section is for attendees’ information. It is very important to document which family members were involved in the home visit. Click on the blue “Add Family Member” button to add a family member to this visit log.



This will open the “Add Family” modal where you can add a family member to a Home Visit Log. You can also dictate if they were a “Family Member Impacted” and/or a “Family Member Present.”

The screenshot shows a modal window titled "Add Family" with the following fields:

- Select Family Member:** A dropdown menu with "Ronil Rabinesh Dayal" selected.
- Family Member Impacted:** A checkbox that is checked.
- Family Member Present:** A checkbox that is checked.
- Pregnant Parent:** Radio buttons for "Yes" and "No", with "No" selected.



If the family member is a parent, you will be required to note if they are a “Pregnant Parent” or not by selecting “Yes” or “No.”

Pregnant Parent

Yes No

You can finalize the addition of this family member by clicking on the blue “Save” button at the bottom of the modal. This family member will now appear in the table like this:

Attendees Information [Add Family Member](#)

Family Member	Pregnant Parent	Present	Impacted	Actions
Ronil Rabinesh Dayal	No	Yes	Yes	 

6 Step 5 can be repeated as many times as needed until all family members have been added to the Home Visit Log.

7 The next section is for the Topics of the Home Visit. To add a topic, click on the blue “Add topics” text at the bottom of the card shown here:

Topics * [Assign Percentage](#)

Search: Show entries Showing 0 to 0 of 0 entries

<input type="checkbox"/> Topic	<input type="text" value="Percent of Time Spent"/>	Actions
No data available in table		

Previous Next

Total Percentage: 0%

[+ Add topics](#)

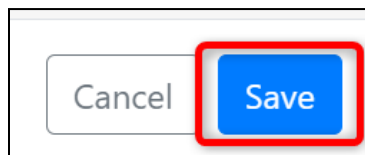
You will then be able to select a topic from the sub-topics shown within the modal here, such as Child Development or Housing.

Add Topic [Close]

Child Development	School Readiness
[Dropdown]	[Dropdown]
Social-Emotional Health	Housing
[Dropdown]	[Dropdown]
Health and Safety	Resume Writing
[Dropdown]	[Dropdown]
Maternal Health	Job Application Assistance
[Dropdown]	[Dropdown]
Job Interviewing Assistance	Workplace Expectations
[Dropdown]	[Dropdown]
Life Skills	Job Retention
[Dropdown]	[Dropdown]
Job Searching Techniques	Other
[Dropdown]	[Dropdown]

[Cancel] [Save]

Once you are happy with the topics that you have selected, click on the blue “Save” button at the bottom of the modal to finalize your topics for this visit.



8

You may then enter any tangible resources that you have provided for the family in the “Resources Provided” section shown below. Click on the blue “Add Resource” button to open up the modal.

Resources Provided

Resource	Quantity	Actions
<div style="border: 1px solid red; padding: 2px; display: inline-block;">+ Add Resource</div>		

You can then enter the name of the resource(s) that have been provided to the family as well as the quantity of them. Finalize these entries by clicking on the blue “Save” button.

Add Resource

Resource Provided

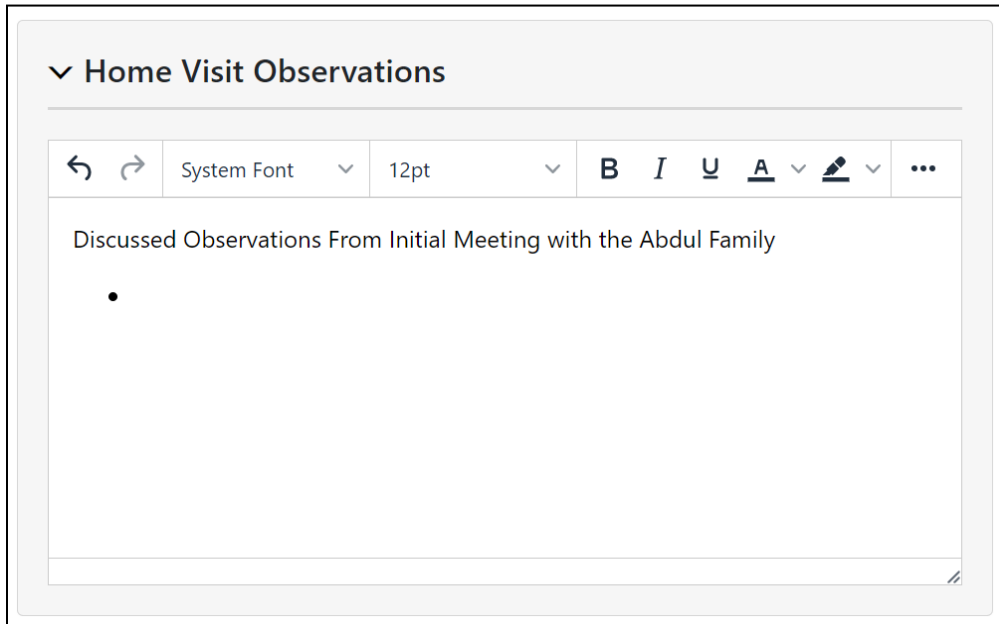
Quantity

9

At the bottom of the Home Visit Log is a cluster of note fields with various header groupings. Some of the options shown by default are “Home Visit Observations,” “Suggested Family Activities,” and “General Home Visit Notes.” See all of the included note fields below:

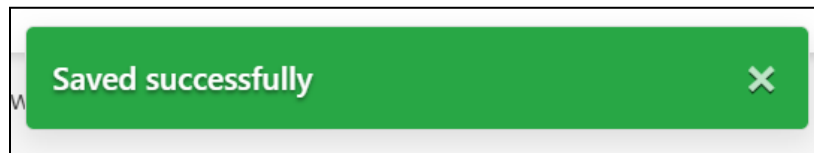
> Home Visit Observations	> Suggested Family Activities
> General Home Visit Notes	> Family Goals Addressed
> Successes	> Challenges
> Current Needs	> Other

All of these note fields function the same way and are a great way to organize your thoughts across various topics. To expand a note field, click on the header itself, and the note field will expand as shown below:



These note fields are equipped with similar technology to a Microsoft Word document, so feel free to be as creative as you want when formatting these note fields.

10 Once all of the information for the Home Visit has been entered, there is no additional action needed on your end. The **Home Visit** record is equipped with an “Auto-Save” feature, meaning that everytime a change is made to a field on the log that the record itself will automatically save. As you go through the record and make changes, you should notice a green “toast” message appearing at the top of the page that looks like this:



This is our system’s way of communicating with you that the work being done is being saved as you go. To exit the home visit record, click on the blue “Back” button at the top of the page.

