

HVP 19 Data Management Grid

Roles that Have Access: Home Visit Manager, Home Visit Supervisor, Home Visitor

The HVP 19 Data Management grid is designed as a one-stop-shop for reviewing and managing data related to the HVP 19 report. Within the lens of a single program, you can review and update several key pieces of information related to Home Visiting Information. This grid is accessible by all Home Visiting roles, but Home Visitors can only see information for families who are on their caseload.

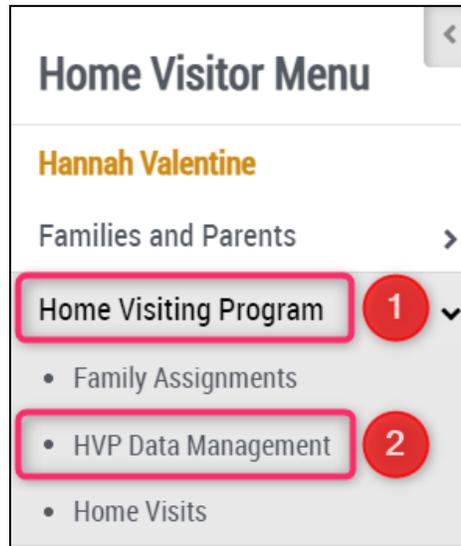
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Navigating to the HVP Data Management Grid

Navigating to the **HVP Data Management** grid will be a little different depending on your role, but Home Visitors will start from the **Home Visitor Menu**. From there, click on the “Home Visiting Program” menu item and then select “HVP Data Management.”



2

This will direct you to the **HVP Data Management** grid, which looks like this for Home Visitors. Please note that Home Visitors, unlike Home Visit Managers, can **only** see home visit information for families that have been caseload to them. For instructions on how to caseload families to a Home Visitor, view our helpful instruction sheet on [Caseloading Families to Home Visitors](#).

All Home Visit staff can review their HVP 19 Data Management grids and update the data that needs to be uploaded for the purpose of reporting.

The screenshot shows the 'HVP Data Management' grid for Hannah Valentine. The grid displays a table of family assignments with the following columns: Family ID, Family Name, Family Program Assignment ID, Family Service Home Visit Schedule Name, CalWORKS Client Type, Family Service Home Visiting Schedule Start Date, Family Service Home Visit Schedule End Date, Notes, and Family CalWorks ID. The table contains two entries: the Aceves Family and the Hernandez Family.

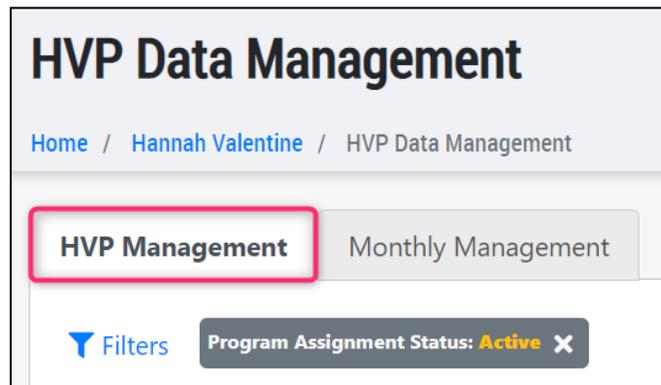
| Family ID | Family Name | Family Program Assignment ID | Family Service Home Visit Schedule Name | CalWORKS Client Type | Family Service Home Visiting Schedule Start Date | Family Service Home Visit Schedule End Date | Notes | Family CalWorks ID |
|------------|------------------|------------------------------|---|----------------------|--|---|-------|--------------------|
| HH10056913 | Aceves Family | FS001007 | CalWORKS Home Visiting Program | WTW Eligible | 1/1/2023 | [Not set] | (0) | 1788 |
| HH14283919 | Hernandez Family | FS001013 | CalWORKS Home Visiting Program | WTW Eligible | 12/4/2022 | 12/4/2025 | (0) | 1978 |

Overview of the HVP Data Management Page

The **HVP Data Management** grid is a place to review all of the Home Visiting data that is relevant to the HVP 19 report. Since the HVP 19 report is so robust and has many different data points, this grid pulls together these important data points into a single place for review. In order for families to show up on this grid, they must be enrolled in a Home Visiting Program. For instructions on how to enroll a Family in a Home Visiting Program, see our instruction sheet, [Enrolling Families in a Program](#).

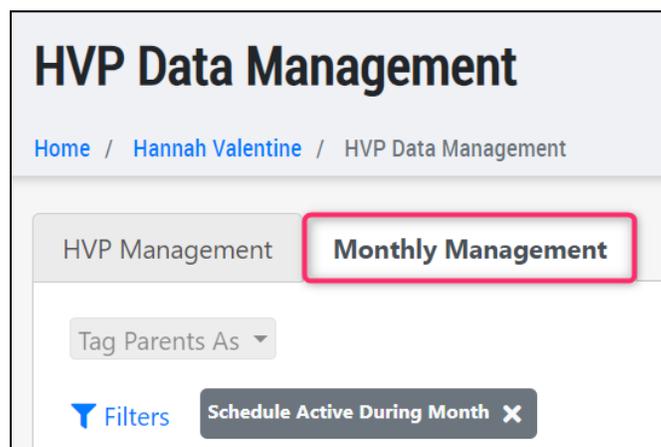
There are two tabs on the **HVP Data Management** grid, one titled “HVP 19 Management” and another one titled “Monthly Management.”

The “HVP 19 Management” tab displays all of the relevant HVP 19 information for families enrolled in a Home Visiting Program that does not change from month-to-month. While we understand that the HVP 19 is reported on a monthly basis, there are some pieces of information about the program participants that **do not** change from month to month. This first tab allows users to review and update family information.



2

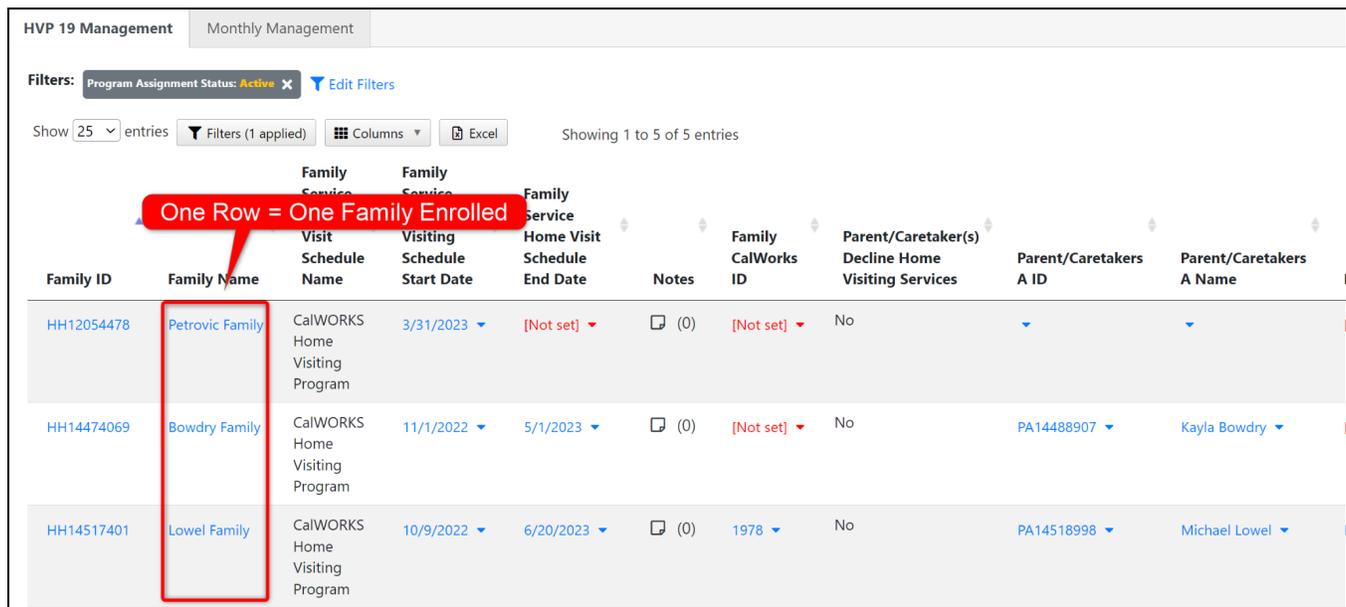
The “Monthly Management” tab displays all of the relevant HVP 19 information for families enrolled in a Home Visiting Program that changes from month-to-month. Certain information is necessary to track and update every single month for the families enrolled, with the most basic being the number of Home Visits that have been completed. This second tab gives the ability to review and update the monthly information that feeds the HVP 19 report.



The “HVP Management” Tab

As mentioned in the section above, the “HVP 19 Management” tab shows all of the relevant HVP 19 information for families enrolled in a Home Visiting Program that does not change from month-to-month. While we understand that the HVP 19 is reported on a monthly basis, there are some pieces of information about the program participants that **do not** change from month to month. The purpose of this first tab is to review and update these bits of information for a family.

This grid contains information about all of the families who are enrolled in a Home Visiting Program. If you have one hundred families enrolled in a Home Visiting Program, then you will have one hundred total rows in this table.

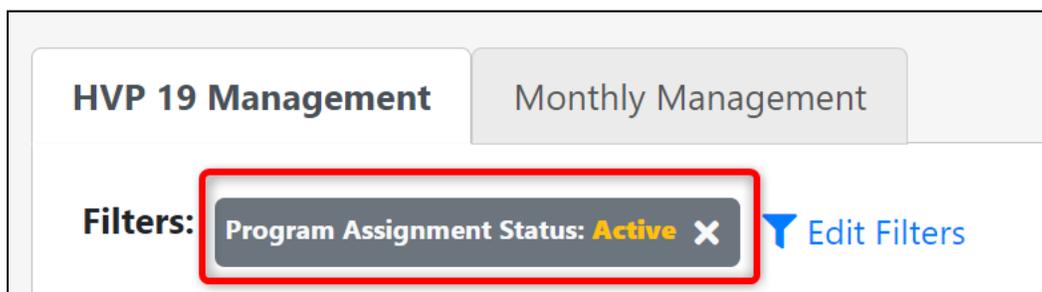


The screenshot shows the 'HVP 19 Management' tab with a 'Monthly Management' sub-tab. A filter is applied: 'Program Assignment Status: Active'. The grid displays 5 entries. A red callout box points to the first row, stating 'One Row = One Family Enrolled'.

| Family ID | Family Name | Family Service Name | Family Service Start Date | Family Service End Date | Notes | Family CalWorks ID | Parent/Caretaker(s) Decline Home Visiting Services | Parent/Caretakers A ID | Parent/Caretakers A Name |
|------------|-----------------|--------------------------------|---------------------------|-------------------------|-------|--------------------|--|------------------------|--------------------------|
| HH12054478 | Petrovic Family | CalWORKS Home Visiting Program | 3/31/2023 | [Not set] | (0) | [Not set] | No | | |
| HH14474069 | Bowdry Family | CalWORKS Home Visiting Program | 11/1/2022 | 5/1/2023 | (0) | [Not set] | No | PA14488907 | Kayla Bowdry |
| HH14517401 | Lowel Family | CalWORKS Home Visiting Program | 10/9/2022 | 6/20/2023 | (0) | 1978 | No | PA14518998 | Michael Lowel |

2

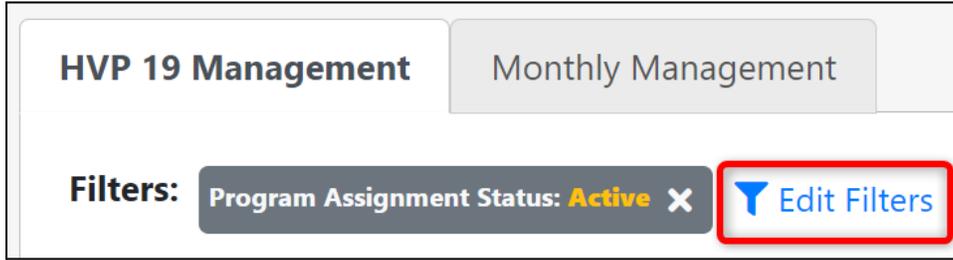
By default, there is a filter applied to the grid that hides any families who were previously enrolled in a program, but have since exited. This filter is on top of the grid - the grey box that states “Program Assignment Status: Active.”



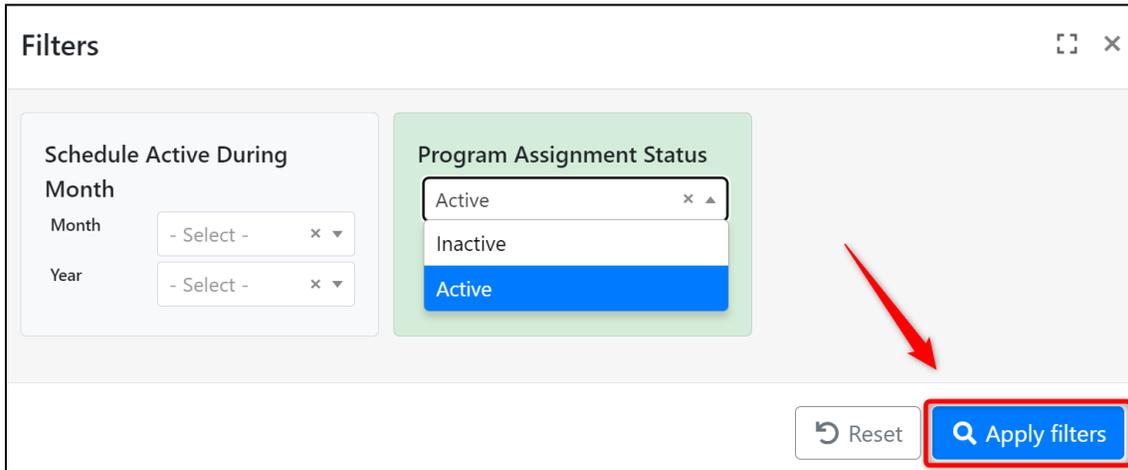
So by default, the grid will only show actively enrolled families. You can remove this filter and view all families, both active and inactive, by clicking the “x.”

3

Click on the blue “Edit Filters” text to either view all family enrollments or narrow them down by other criteria.

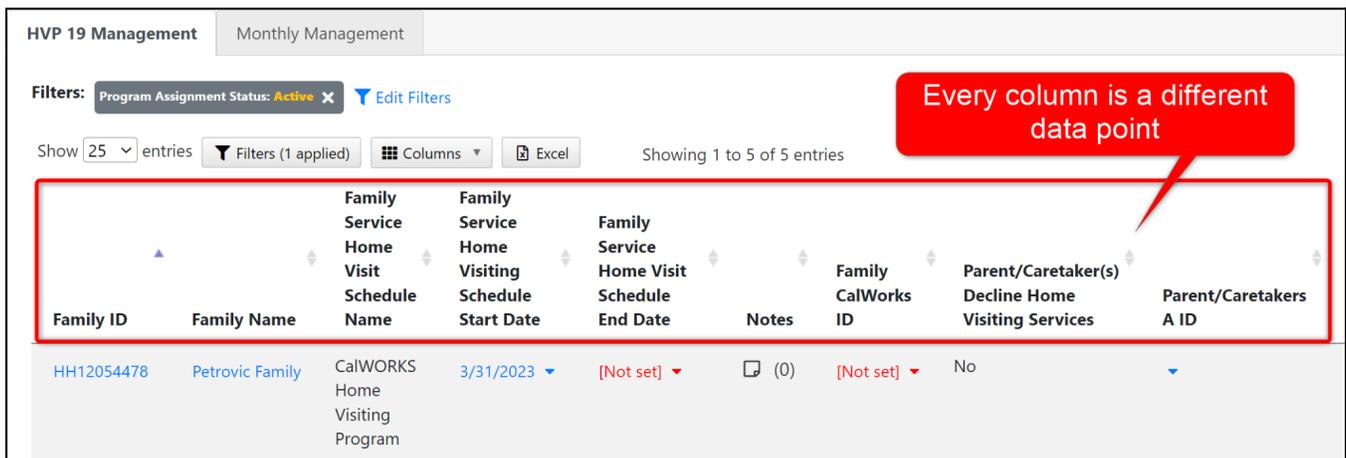


You can add or remove filters as desired and then finalize your filter selections by clicking on the blue “Apply filters” button at the bottom of the modal. The filter selections will now be applied to the grid.



4

Once you are satisfied with the families that are being shown in this grid, you can begin reviewing all of the information that is shown. Each column in the grid represents a data value for the family that is significant to the HVP 19 report. There are a plethora of data points related to parent, child, and Home Visiting information.



5

The **HVP Data Management** grid is so effective because data values shown on the HVP 19 grid can be updated directly. Anything on the grid that is blue or red is the system's way of communicating to the user that the value is clickable. All of the cell values shown below are cells that can be clicked on:

| Family ID | Family Name | Family Service Home Visit Schedule Name | Family Service Home Visiting Schedule Start Date | Family Service Home Visit Schedule End Date | Notes | Family CalWorks ID |
|----------------------------|---------------------------------|---|--|---|-------|-----------------------------|
| HH12054478 | Petrovic Family | CalWORKS Home Visiting Program | 3/31/2023 ▼ | [Not set] ▼ | (0) | [Not set] ▼ |
| HH14474069 | Bowdry Family | CalWORKS Home Visiting Program | 11/1/2022 ▼ | 5/1/2023 ▼ | (0) | [Not set] ▼ |

If the text shown is blue and does **not** have a little downward pointing arrow next to it (caret) then that text is a link to a record inside of the system. So if you click on the blue text for the “Petrovic Family” within the grid as shown in the screenshot, you will be directed to their **Family** record.

Petrovic Family

[Home](#) / [Applebank USD](#) / [Petrovic Family](#)

[Edit](#) [Delete](#) [Add Students to Class/Site List](#) [Download](#) [Inactivate family](#)

Household ID
HH12054478

Unique Identifier
Alana Petrovic

Site Preference + Add
Allen State Elementary

Main Contact (Parent A)
Address
46846 Fazelli Oaks Rd
Maple CA, 925621234

Petrovic Family
Allen State Elementary
Riverbank CDC [Preferred](#)

6

Alternatively, any data value in the table that is colored **and** has a little downward pointing arrow next to it (caret) represents a data point that **can** be edited directly from the grid. These are values that are oftentimes important Home Visiting data points that you may want to update from the grid. For example, we can see here that the Petrovic family **does not** have a CalWorks ID entered for them yet. Because of this, the text in the cell is red:

| Family ID | Family Name | Family Service Home Visit Schedule Name | Family Service Home Visiting Schedule Start Date | Family Service Home Visit Schedule End Date | Notes | Family CalWorks ID |
|------------|-----------------|---|--|---|-------|--------------------|
| HH12054478 | Petrovic Family | CalWORKS Home Visiting | 3/31/2023 | [Not set] | (0) | [Not set] |

Instead of having to leave and go to another place in the system to update this information, we can simply click directly onto the red text, and it will open up a modal for us:

Update Calworks ID

Family Calworks ID

Cancel
Save

You can enter in the new data value and click on the blue “Save” button to finalize the change.

7

As you parse through the data values shown in the grid, you may find yourself overwhelmed by all of the information shown. You may only want to focus on a small subset of information to update. Click on the button at the top of the grid labeled “Columns” to narrow down the information shown.

HVP 19 Management Monthly Management

Filters: Program Assignment Status: Active Edit Filters

Show entries Filters (1 applied) Columns Excel

This will open up a modal where you can pick and choose which data values you wish to see in the table. Simply check or uncheck these fields to show or hide them in the grid. For a clean start, you can click on “Unselect All” to uncheck all columns. You can also easily re-select all columns by clicking “Select All.”

| | |
|--|--|
| Select all | <input type="checkbox"/> Parent B Language |
| Unselect all | <input checked="" type="checkbox"/> Parent B Pregnancy Due Date(s) |
| <input checked="" type="checkbox"/> Family ID | <input checked="" type="checkbox"/> Parent/Caretakers B Welfare-to-Work Exempt |
| <input checked="" type="checkbox"/> Family Name | <input checked="" type="checkbox"/> Parent/Caretakers B Welfare-to-Work Plan Signed Date |
| <input checked="" type="checkbox"/> Family Service Home Visit Schedule Name | <input checked="" type="checkbox"/> Child 1 |
| <input checked="" type="checkbox"/> Family Service Home Visiting Schedule Start Date | <input checked="" type="checkbox"/> Child 1 DOB |
| <input checked="" type="checkbox"/> Family Service Home Visit Schedule End Date | <input checked="" type="checkbox"/> Child 2 |
| <input checked="" type="checkbox"/> Notes | <input checked="" type="checkbox"/> Child 2 DOB |
| <input checked="" type="checkbox"/> Family CalWorks ID | <input checked="" type="checkbox"/> Child 3 |
| <input checked="" type="checkbox"/> Parent/Caretaker(s) Decline Home Visiting Services | <input checked="" type="checkbox"/> Child 3 DOB |
| <input checked="" type="checkbox"/> Parent/Caretakers A ID | <input checked="" type="checkbox"/> Number of Home Visits Draft |
| <input checked="" type="checkbox"/> Parent/Caretakers A Name | <input checked="" type="checkbox"/> Number of Home Visits Canceled/Declined |
| <input checked="" type="checkbox"/> Parent A Described As | <input checked="" type="checkbox"/> Number of Home Visits Scheduled/Offered |
| <input type="checkbox"/> Parent A Ethnicity | <input checked="" type="checkbox"/> Number of Home Visits Rescheduled |
| <input type="checkbox"/> Parent A Language | <input checked="" type="checkbox"/> Number of Home Visits Complete/Received |
| <input checked="" type="checkbox"/> Parent A Pregnancy Due Date(s) | <input checked="" type="checkbox"/> Number of Home Visits Attempted But Not Completed |
| <input checked="" type="checkbox"/> Parent/Caretakers A Welfare-to-Work Exempt | <input checked="" type="checkbox"/> Number of Parent Referrals in Draft |
| <input checked="" type="checkbox"/> Parent/Caretakers A Welfare-to-Work Plan Signed Date | <input checked="" type="checkbox"/> Number of Parent Referrals Made |
| <input checked="" type="checkbox"/> Parent/Caretakers B ID | <input checked="" type="checkbox"/> Number of Parent Referrals Closed |
| <input checked="" type="checkbox"/> Parent/Caretakers B Name | <input checked="" type="checkbox"/> Number of Child Referrals in Draft |
| <input checked="" type="checkbox"/> Parent B Described As | <input checked="" type="checkbox"/> Number of Child Referrals Made |
| <input type="checkbox"/> Parent B Ethnicity | <input checked="" type="checkbox"/> Number of Child Referrals Closed |

8

We recommend that you familiarize yourself with all of the information that is presented on the grid. The main chunks of information pulled into the grid are as follows:

- General Family Information
- Parent Information
- Child Information
- Home Visiting Information
- Referral Information

In addition to updating the data from the grid, you can also update the information from the respective records as well. To navigate to a **Family** Record, click on either cell value in the first two columns titled “Family ID” or “Family Name.”

The “Monthly Management” Tab

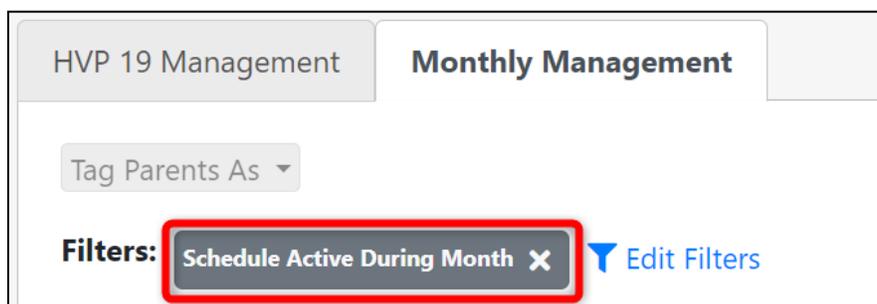
As mentioned in one of the earlier sections, the “Monthly Management” tab shows you all of the relevant HVP 19 information for families enrolled in a Home Visiting Program that changes from month-to-month. Certain information is necessary to track and update every single month for the families enrolled, with the most basic being the number of Home Visits that have been completed. This second tab gives users a way to review and update the monthly information that feeds the HVP 19 report.

This grid contains information about all families who are enrolled in a Home Visiting Program. If you have one hundred families enrolled in a Home Visiting Program, then you will have one hundred total rows in this table. Note that this tab will only show family information **for a single month at a time**.

The screenshot shows the 'Monthly Management' tab interface. At the top, there are tabs for 'HVP 19 Management' and 'Monthly Management'. Below the tabs is a 'Tag Parents As' dropdown menu. A 'Filters' section contains a grey box labeled 'Schedule Active During Month' with an 'x' icon and an 'Edit Filters' button. A search bar is followed by 'Show 25 entries', 'Filters (1 applied)', and 'Columns' dropdown. The text 'Showing 1 to 6 of 6 entries' is on the right. A table with the following columns is displayed: Family ID, Family Name, Home Visit Schedule Name, Home Visiting Schedule Start Date, Service Home Visit Schedule End Date, Parent/Caretakers A ID, and Parent/Caretakers A Name. The first row is highlighted with a red border and a red callout box pointing to it with the text 'One Row = One Family Enrolled that Month'. The second row is also visible.

| Family ID | Family Name | Home Visit Schedule Name | Home Visiting Schedule Start Date | Service Home Visit Schedule End Date | Parent/Caretakers A ID | Parent/Caretakers A Name |
|------------|------------------|--------------------------------|-----------------------------------|--------------------------------------|------------------------|--------------------------|
| HH12054478 | Petrovic Family | CalWORKS Home Visiting Program | 3/31/2023 | [Not set] | | |
| HH14283919 | Hernandez Family | CalWORKS Home Visiting Program | 12/4/2022 | 4/1/2023 | PA14288696 | Amanda Hernandez |

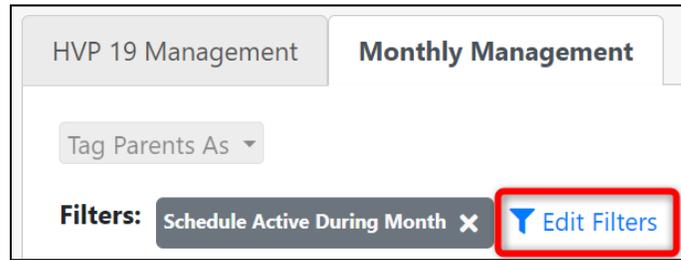
2 By default, there is a filter applied to the grid that only shows families who are enrolled in the current month. This filter is on top of the grid - the grey box that states “Schedule Active During Month.”



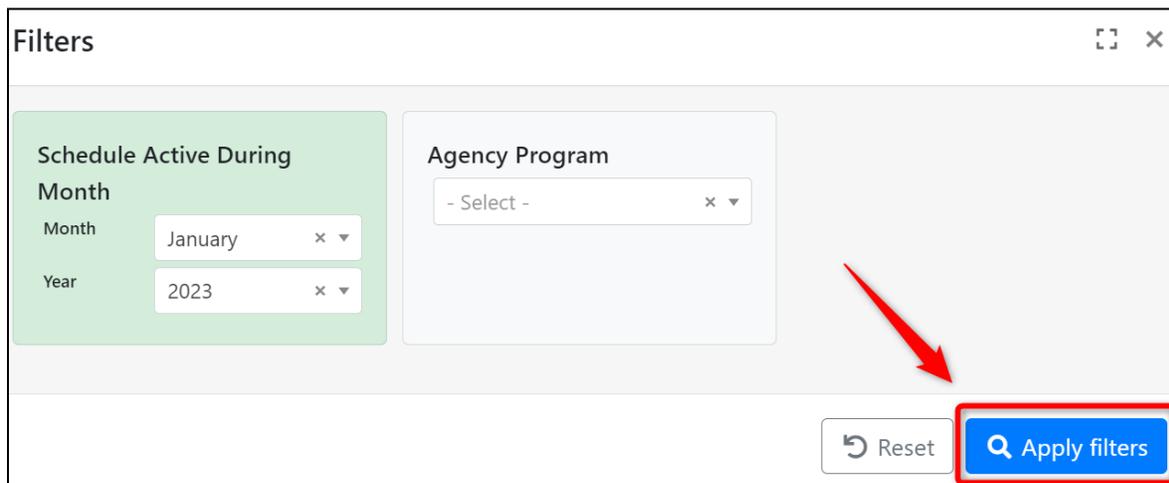
So by default, the grid will only show families enrolled during a single month. You can remove this filter and view families outside of the current month by clicking the “x.”

3

If you wish to remove this filter and view all family enrollments **or** you wish to filter the information shown for a different month, you can click on the blue “Edit Filters” text.

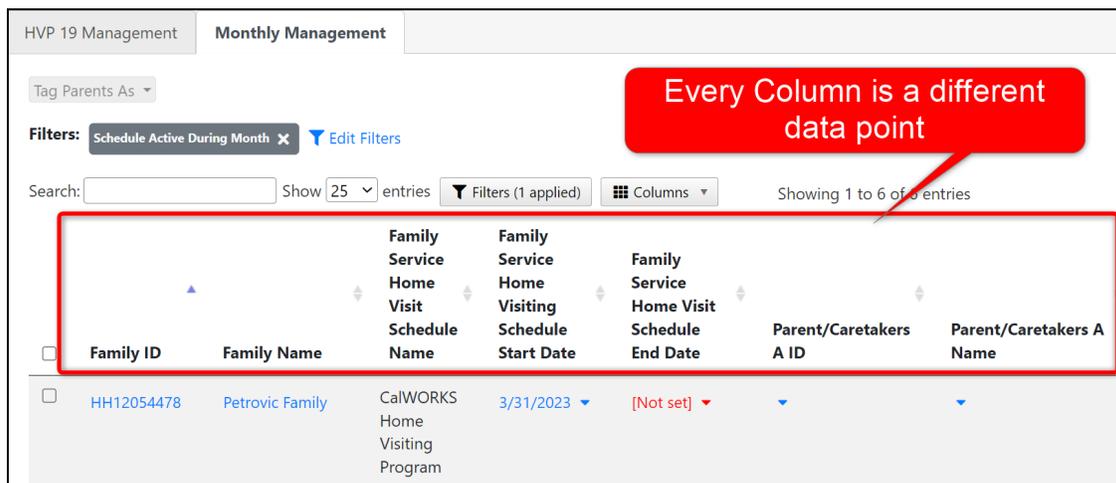


You can add or remove filters as desired and then finalize your filter selections by clicking on the blue “Apply filters” button at the bottom of the modal. The filter selections will now be applied to the grid.



4

Once you are happy with the filter criteria, you can begin reviewing all of the information that is shown. Every column in the grid represents a data value for the family that is significant to the HVP 19 report. There are a plethora of data points related to parent, child, and Home Visiting information.



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| Family ID | Family Name | Family Service Home Visit Schedule Name | Family Service Home Visiting Schedule Start Date | Family Service Home Visit Schedule End Date | Parent/Caretakers A ID | Parent/Caretakers A Name |
|------------|------------------|---|--|---|------------------------|--------------------------|
| HH12054478 | Petrovic Family | CalWORKS Home Visiting Program | 3/31/2023 | [Not set] | | |
| HH14283919 | Hernandez Family | CalWORKS Home Visiting Program | 12/4/2022 | 4/1/2023 | PA14288696 | Amanda Hernandez |

If the text shown is blue and does **not** have a little downward pointing arrow next to it (caret) then that text is a link to a record inside of the system. So if you click on the blue text for the “Petrovic Family” within the grid as shown in the screenshot, you will be directed to their **Family** record.

Petrovic Family

Home / Applebank USD / Petrovic Family

Edit
Delete
Add Students to Class/Site List
Download
Inactivate family

Household ID
HH12054478

Unique Identifier
Alana Petrovic

Site Preference + Add
 Allen State Elementary
 Riverbank CDC **Preferred**

Main Contact (Parent A)
Address 46846 Fazelli Oaks Rd
Maple CA, 925621234

Petrovic Family

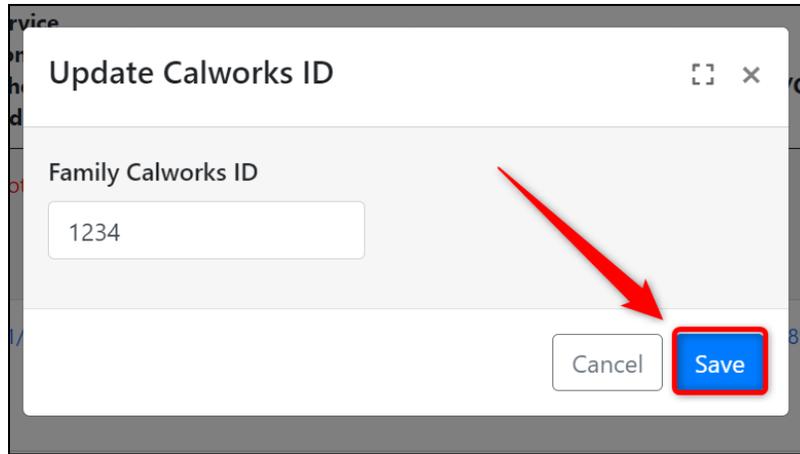
Allen State Elementary
 Riverbank CDC **Preferred**

6

Alternatively, any data value in the table that is colored **and** has a little downward pointing arrow next to it (caret) represents a data point that **can** be edited directly from the grid. These are values that are oftentimes important Home Visiting data points that you may want to update from the grid. For example, we can see here that the Petrovic family **does not** have a CalWorks ID entered for them yet. Because of this, the text in the cell is red:

| Family ID | Family Name | Family Service Home Visit Schedule Name | Family Service Home Visiting Schedule Start Date | Family Service Home Visit Schedule End Date | Notes | Family CalWorks ID |
|------------|-----------------|---|--|---|-------|--------------------|
| HH12054478 | Petrovic Family | CalWORKS Home Visiting | 3/31/2023 | [Not set] | (0) | [Not set] |

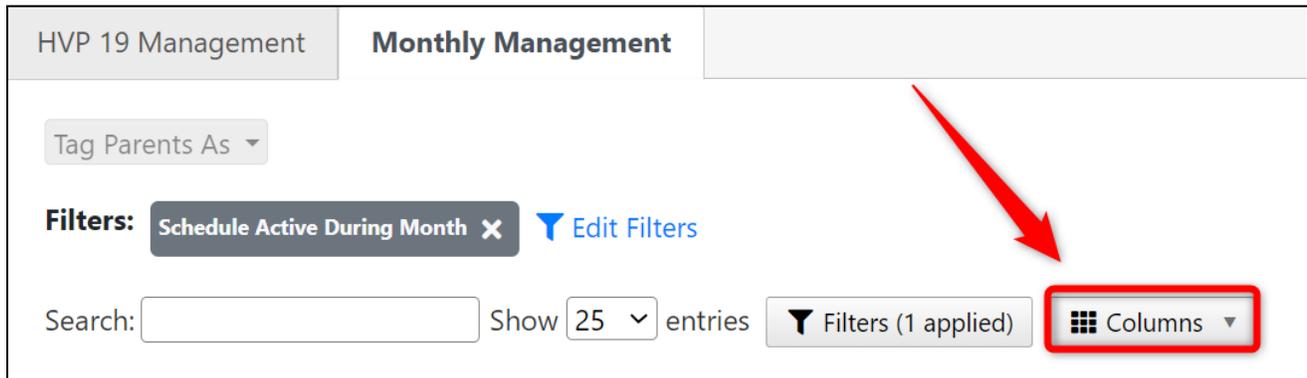
Instead of having to leave and go to another place in the system to update this information, we can simply click directly onto the red text, and it will open up a modal for us:



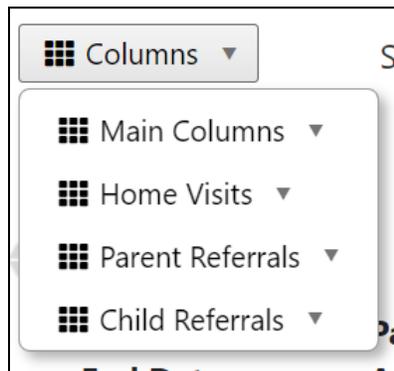
You can enter in the new data value and click on the blue “Save” button to finalize the change.

7

As you parse through the data values shown in the grid, you may find yourself overwhelmed by all of the information shown. You may only want to focus on a small subset of information to update. Click on the button at the top of the grid labeled “Columns” to narrow down the information shown.



This will open a modal where you can pick and choose which data values you wish to see in the table.



Check or uncheck these fields to show or hide them in the grid. For a clean start, you can click on “Unselect All” to uncheck all columns. You can also easily re-select all columns by clicking “Select All.”

| | |
|--|--|
| Select all | <input checked="" type="checkbox"/> Parent A Pregnancy Due Date(s) |
| Unselect all | <input checked="" type="checkbox"/> Parent/Caretakers B ID |
| <input checked="" type="checkbox"/> Family ID | <input checked="" type="checkbox"/> Parent/Caretakers B Name |
| <input checked="" type="checkbox"/> Family Name | <input checked="" type="checkbox"/> Parent B Pregnancy Due Date(s) |
| <input checked="" type="checkbox"/> Family Service Home Visit Schedule Name | <input checked="" type="checkbox"/> Child 1 |
| <input checked="" type="checkbox"/> Family Service Home Visiting Schedule Start Date | <input checked="" type="checkbox"/> Child 1 DOB |
| <input checked="" type="checkbox"/> Family Service Home Visit Schedule End Date | <input checked="" type="checkbox"/> Child 2 |
| <input checked="" type="checkbox"/> Parent/Caretakers A ID | <input checked="" type="checkbox"/> Child 2 DOB |
| <input checked="" type="checkbox"/> Parent/Caretakers A Name | <input checked="" type="checkbox"/> Child 3 |
| | <input checked="" type="checkbox"/> Child 3 DOB |

8 We recommend that you familiarize yourself with all of the information that is presented on the grid. The main chunks of information pulled into the grid are as follows:

- General Family Information
- Parent Information
- Child Information
- Home Visiting Information
- Referral Information

In addition to updating the data from the grid, you can also update the information from the respective records as well. To navigate to a **Family** Record, click on either cell value in the first two columns titled “Family ID” or “Family Name.”

9 One unique thing you can only do from the “Monthly Management” tab is tagging certain parents as “Declined” or “Could not be reached” for a specific month. Say you are reviewing this information and you notice that there are several families who you have tried to reach out to and do not have a home visit for. You can select all of these families, and tag them as “Could not be reached” for the month.

Let's use the Petrovic family as an example. If you tried to contact them but failed, you can check the box next to their name on the grid and then click on the "Tag Parent As" button. From the dropdown option, select "Could not be reached."

The screenshot shows the 'HVP 19 Management' interface with a 'Monthly Management' tab. A dropdown menu titled 'Tag Parents As' is open, showing two options: 'Declined' and 'Could not be reached'. The 'Could not be reached' option is selected. Below the dropdown, there is a search bar, a 'Show 25 entries' dropdown, and a 'Filters (1 applied)' button. A table below shows a list of families with columns for Family ID, Family Name, Family Service Home Visit Schedule Name, Family Service Home Visiting Schedule Start Date, and Family Service Home Visit Schedule End Date. The Petrovic Family is highlighted, and a checkbox next to their name is checked.

| Family ID | Family Name | Family Service Home Visit Schedule Name | Family Service Home Visiting Schedule Start Date | Family Service Home Visit Schedule End Date |
|------------|-----------------|---|--|---|
| HH12054478 | Petrovic Family | CalWORKS Home Visiting Program | 3/31/2023 | [Not set] |

Then, simply enter a Date that you want to tag this parent as not able to be reached, and then click on the blue "Save" button.

The dialog box is titled 'Tag Parents As Could not be reached'. It has a 'Date Tagged' field with the value '04/26/2023'. At the bottom right, there are 'Cancel' and 'Save' buttons.

You have now successfully tagged this parent as non-communicative for this month without having to leave the grid!