

Documenting Depression Screenings, Referrals, and Follow Up in Visit Tracker

Depression Screening:

What are we measuring?



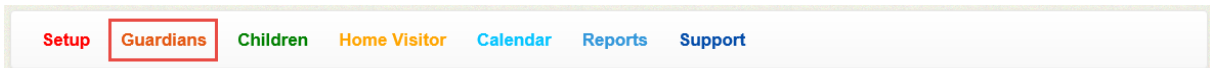
HVSA Aligned Measure 2: Percent of primary caregivers enrolled in home visiting who are screened for depression using a validated tool within 3 months of delivery if enrolled pregnant or 3 months of enrollment if enrolled postnatally.

Instructions:

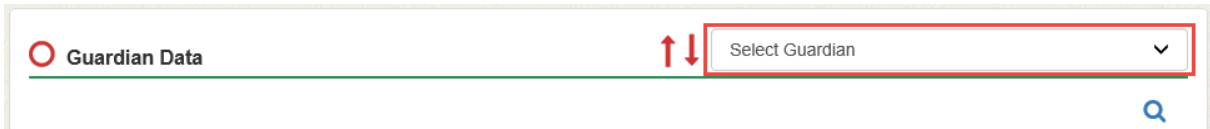
Complete a depression screening for primary caregivers using the PHQ-9 form within **90 days of delivery** if enrolled pregnant or **90 days of enrollment** if enrolled postnatally.

How do I enter a depression screening into Visit Tracker?

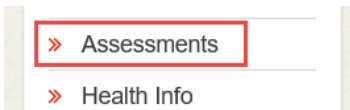
Step 1: Log into Visit Tracker and click on the “Guardians” link in the horizontal menu at the top of the page.



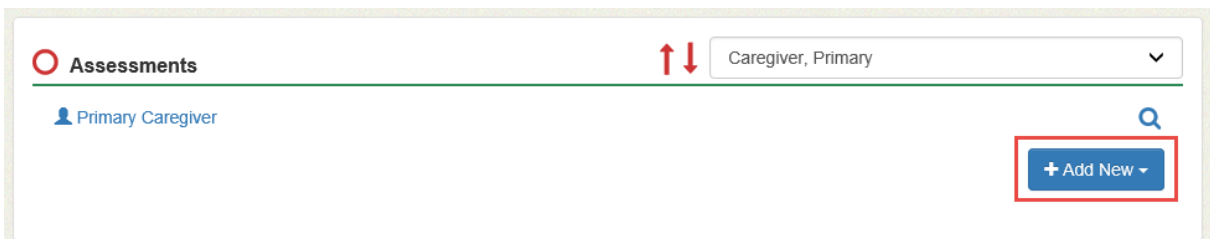
Step 2: Choose the guardian that was screened from the drop-down menu on the Guardian Data page.



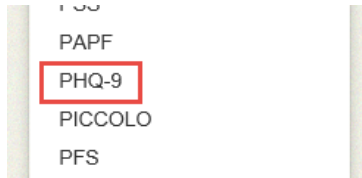
Step 3: Click on the “Assessments” link near the bottom of the menu on the left side of the screen.



Step 4: From the guardian’s assessment page, click on the “+ Add New” button. A drop down menu will appear.



Step 5: Choose PHQ-9 from the drop down menu.



Step 6: Fill out the PHQ-9 form with the guardian's responses. Make sure to enter the date that the screening was completed, not the data entry date. Click create.

Personal Health Questionnaire (PHQ-9)

Date Measurement Tool PHQ-9
Client Name Primary Caregiver Client ID 951543
Home Visitor Home Visitor ID

Guardian declined assessment

	Not at all	Several days	More than half the days	Nearly every day	Not Answered
1 Little interest or pleasure in doing things	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
2 Feeling down, depressed or hopeless	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
3 Trouble falling or staying asleep, or sleeping too much	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
4 Feeling tired or having little energy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
5 Poor appetite or overeating	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
6 Feeling bad about yourself - or that you are a failure or have let yourself or your family down	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
7 Trouble concentrating on things, such as reading the newspaper or watching television	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
8 Moving or speaking so slowly that other people could have noticed. Or the opposite - being so fidgety or restless that you have been moving a lot more than usual	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
9 Thoughts that you would be better off dead, or of hurting yourself	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Subtotals
PHQ-9

*** Referral Instructions:**
 If the answer to question #9 is other than "Not at all", or the total score = 10 or higher, a referral is needed. Once the referral is made, record in the Resource Connections section as "Mental Health Services".

	Not difficult at all	Somewhat difficult	Very difficult	Extremely difficult	Not Answered
10 If you checked off any problems, how difficult have these problems made it for you to do your work, take care of things at home, or get along with other people?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

[Print Report](#)

Completed Depression Referrals:

What are we measuring?



MIECHV Performance Measure 17: Percent of primary caregivers referred to services for a positive screen for depression who receive one or more service contacts.

Instructions: If the total PHQ-9 score is 10 or higher or the caregiver answered something other than “not at all” to question 9, the depression screening is positive and a referral is needed. The referral is considered complete when the caregiver receives one or more service contacts as indicated by a documented follow up.

How do I document a depression referral in Visit Tracker?

There are two routes to documenting a depression referral in Visit Tracker.

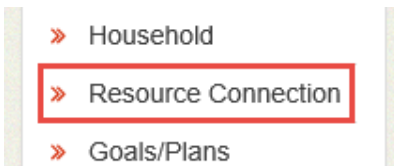
Option 1 is to navigate to the Resource Connections form via the vertical menu on the left side of the screen to document the referral.

Option 1 – Step 1: Choose the guardian from the drop-down menu on the Guardian Data page.



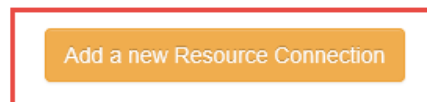
The screenshot shows a horizontal bar with the text "Guardian Data" on the left. To the right of this text is a red double-headed vertical arrow icon. Further right is a drop-down menu with the text "Select Guardian" and a downward-pointing chevron icon. A red rectangular box highlights the "Select Guardian" text and the chevron icon. A magnifying glass icon is visible at the bottom right of the bar.

Option 1 – Step 2: Click on the “Resource Connection” link near the bottom of the menu on the left side of the screen.



The screenshot shows a vertical menu with three items: "Household", "Resource Connection", and "Goals/Plans". Each item is preceded by a right-pointing chevron icon. A red rectangular box highlights the "Resource Connection" item.

Option 1 – Step 3: Click the “Add a new Resource Connection” located in the center of the page. The Resource Connection form will pop up.



The screenshot shows a single orange button with the text "Add a new Resource Connection" in white. A red rectangular box highlights the button.

Option 1 – Step 4: Within the Resource Connection form, enter the date the referral was made.

Option 1 – Step 5: Select the caregiver type from the drop down menu next to “Pertains to.”

Option 1 – Step 6: Make sure to choose “Mental Health Service” from the “Connection Type” drop down menu.



Option 1 – Step 7: Complete the rest of the fields with the appropriate information and click “Create.”

Option 2 to document the referral is to navigate to the Resource Connections form via a Personal Visit Record (PVR).

Option 2 – Step 1: Choose the guardian from the drop-down menu on the Guardian Data page.

Option 2 – Step 2: Click on the “Contact History” link near the middle of the vertical menu on the left side of the screen.

Option 2 – Step 3: Within the list of Guardian Contacts, click on “Private” next to the visit date when the screening occurred. This will open the PVR form.

Date	Type	Home Visitor	Children	Total	0-3	>3	Pre
10/4/2018	Private	Home Visitor2	Bornchild Caregiver	1	1	0	Y  

Option 2 – Step 4: Within the Family Well-Being section of the PVR, click on the radio button under “CR” and next to “Mental Health Services.” The Resource Connection form will pop up.

N	I	CR	
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Inter-birth Intervals
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Domestic Violence Services
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Suspected Child Abuse/Neglect
Mental Health and Wellness			
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Substance Use (drugs/alcohol)
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Mental Health Services
Child Care			
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	General Child Care/Preschool Informa
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Early Childhood Intervention
Relationships with family and friends			
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Social support network
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Community/group participation
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Advocacy and leadership
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Intimate partner violence
Recreation and enrichment			
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Recreation/Enrichment Activities
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Community centers, libraries, museurr
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Parks and other leisure opportunities
Other			
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Other

Option 2 – Step 5: Enter the date the referral was made.

Option 2 – Step 6: Select the caregiver type from the drop down menu next to “Pertains to.”

Option 2 – Step 7: Make sure to choose “Mental Health Service” from the “Connection Type” drop down menu.

Option 2 – Step 8: Complete the rest of the fields with the appropriate information and click “Create.”

The screenshot shows a 'Resource Connection' form with the following fields and values:

- Connection Date:** 10/04/2018
- Pertains to:** Mother
- Connection Type:** Mental Health Services
- Connected By:** Home Visitor
- Connected To:** Mental Health Service
- Connection Reason:** Positive PHQ-9
- Comments:** (Empty text area)

Buttons for 'Create' and 'Cancel' are located at the bottom right of the form.

How do I document a completed referral in Visit Tracker?

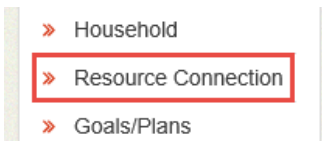
There are two routes to documenting a depression referral in Visit Tracker.

Option 1 is to navigate to the Resource Connections form via the vertical menu on the left side of the screen.

Option 1 – Step 1: Choose the guardian from the drop-down menu on the Guardian Data page.



Option 1 – Step 2: Click on the "Resource Connection" link near the bottom of the menu on the left side of the screen.



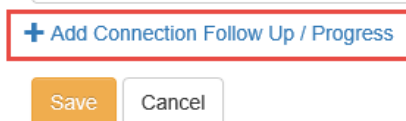
Option 1 – Step 3: There will be a table near the bottom of the page with all referrals that have been made for this caregiver. Click on the pencil/edit button next to the referral for which you would like to document a follow-up.



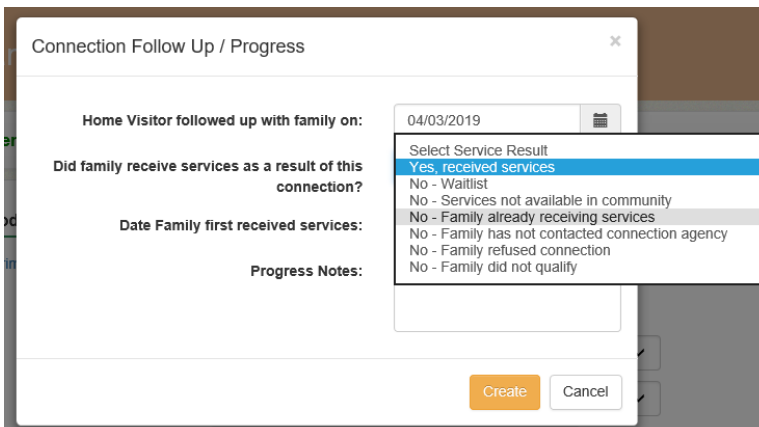
Date	Type	Reason	Follow up Date	Follow up Services	Comments
10/4/2018	Mental Health ...	Positive PHQ-9.			

The table has a red box around the edit button (pencil icon) in the 'Comments' column of the first row.

Option 1 – Step 4: The next page will allow you to modify the resource connection. To add follow up information, click on the "Add Connection Follow Up/Progress" link near the bottom of the page. A Connection Follow Up/Progress menu will pop up.



Option 1 – Step 4: Enter the date when the follow up occurred, then choose an option from the drop down menu next to "Did Family Receive Services as a result of this connection?" Choosing "Yes, received services" or "No – Family already receiving services" indicates that the caregiver received one or more services contacts and met the measure.

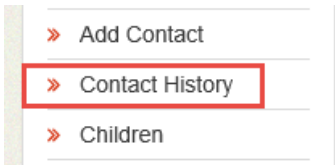


Option 2 is to document a follow up is to navigate to the Resource Connections form via a Personal Visit Record (PVR).

Option 2 – Step 1: Choose the guardian from the drop-down menu on the Guardian Data page.



Option 2 – Step 2: Click on the “Contact History” link near the middle of the vertical menu on the left side of the screen.



Option 2 – Step 3: Within the list of Guardian Contacts, click on “Private” next to the visit date when the screening occurred. This will open the PVR form.

Date	Type	Home Visitor	Children	Total	0-3	>3	Pre
10/4/2018	Private	Home Visitor2	Bornchild Caregiver	1	1	0	Y  

Option 2 – Step 4: Under the “Resource Connections” header in the PVR, click on the pencil/edit button next to the resource connection you followed up on. A Connection Follow Up/Progress menu will pop up.

Resource Connections

Were resource connections reviewed during this visit? Yes No N/A

Please note any follow-up on previously made resource connections:

1. Rec Center 
2. Mental Health Service 

Option 2 – Step 5: Enter the date when the follow up occurred, then choose an option from the drop down menu next to “Did Family Receive Services as a result of this connection?” Choosing “Yes, received services” or “No – Family already receiving services” indicates that the caregiver received one or more services contacts and met the measure.

