DESIGN STORY

HEALTHY FAMILIES OREGON (HFO) CLARA™ ENHANCEMENTS

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1. SCREENING

Process starts when a **Screener** *initiates* **Client Screening** and *completes* an **Eligibility Screening Workflow**
➢ Generates Client record for primary caregiver
➢ Generates Client record for focus child (if applicable)
➢ Generates Pregnancy record (if applicable) with Client ID set aside for future focus child
➢ Generate Services Request if "*Eligible*" (or if "*Recommended Clinical Positive*") and client "*Requests*".
➢ Upon "*Req*uest", either go to **Eligibility Screening Console,** or simply close workflow depending on role.
➢ If Client "*Denies*" services, no Service Request is generated.

Design Features Utilized:
○ HF0 2.1 Core Screening Workflow
○ HFO 2.2 Primary Caregiver and Focus Child Identification
○ HFO 2.3 New Baby Questionnaire Scoring and Eligibility Determination
○ HFO 2.4 Clinical Positive Data Tracking and Workflow
○ HFO 2.19 Survey Question Skip Logic

2. SCREENING REVIEW & ASSIGNMENT

Program Manager *reviews and assigns* the **Eligibility Screening** and the **Service Request** from the **Eligibility Screening Console**
➢ **Program Manager** can *review* client information and screening results including potential "Clinical positive" recommendation
➢ **Program Manager** can manage the **Service Request** including *reviewing* it, *approving* it, and *assigning it to a Home Visitor.*

Features Utilized:
○ HF0 2.1 Core Screening Workflow
○ HFO 2.4 Clinical Positive Data Tracking and Workflow
○ HFO 2.5 Inter-area Home Visitor Assignment

3. OUTREACH

Once assigned, **Home Visitor** *documents* the **Service Request** from the **Service Request Console**

➢ The **Home Visitor** *completes* the Service Request through steps in a **Service Request Pathway**
➢ The pathway includes "Home Visit Offer Acceptance", ~~"Scheduling appointment"~~, and "Client Enrollment"
➢ **Home Visitor** can also *add* **"Pre-enrollment Activities",** associated with the **Service Request,** which may include "**Schedule-able (Visit) Activities**", that will appear on the **Home Visitor's** calendar.
➢ The final step in the **Service Request Pathway** is to *initiate* **Client Enrollment**

Features Utilized:
o HFO 2.5 Inter-area Home Visitor Assignment
o HFO 2.6 Home Visit Offer Acceptance
o HFO 2.7 Client Enrollment and First Home Visit

4. ENROLLMENT

Home Visitor *initiates* **Client Enrollment** and *completes* **Client intake Workflow**
➢ Program, Client, and Screening steps of Workflow pre-filled from Screening information
➢ **Home Visitor** *completes* **"Consent"** and **"Enrollment"** steps**.**
➢ Workflow generates **Enrollment**
➢ **Case** and **Care Plans** generated as part of Enrollment
➢ Enrollment automatically generates a **Case Visit** record with the same date as the Enrollment ~~using information from the "Schedule Appointment" step of the Service Request Pathway~~
➢ Completing **Client Intake Workflow** re-directs **Home Visitor** to **Home Visit Charting Tool** for the generated Case Visit.

Features Utilized:
o HFO 2.7 Client Enrollment and First Home Visit

5. FIRST HOME VISIT

Home Visitor *completes* the **Home Visit** with the **Home Visit Charting Tool**
➢ User completes all the documentation of their first Home Visit where they enrolled the client
➢ Completing the documentation of the Home Visit takes the user to the **Case Console**

Features Utilized:
o HFO 2.20 Home Visit Charting Workflow
o HFO 2.12 Case Dashboard and Data Management

6. CASE MANAGEMENT

Home Visitor *manages* the **Case** from the **Case Console.**
➢ **Case Console** includes a "roll-up" of all the existing Care Plan tools for all clients on the Case
➢ **Case Console** includes a way to initiate a **Pregnancy Transition**
➢ **Case Console** includes a way to manage a **Case Assignment** and **Service Level**
➢ **Case Console** includes a way to initiate a **Primary Caregiver Transition**

Features Utilized:
o HFO 2.12 Case Dashboard and Data Management
o HFO 2.13 Primary Caregiver Identification and Transition

- HFO 2.13 Primary Caregiver Identification and Transition
- HFO 2.8 Pregnancy Transition
- HFO 2.11 Case Assignment and Service Level Management
- HFO 2.15 Data Tracking Schedule Adjustments based on Premature Birth
- HFO 2.16 Data Tracking Schedule Changes
- HFO 2.18 Rights and Confidentiality Data Validation
- HFO 2.20 Home Visiting Charting Workflow
- HFO 2.21 Active Service Level Display – Home Visit Record
- HFO 2.27 Client Conditions Tracking Tool

7. PROGRAM OVERSIGHT & EVALUATION

Supervisor and Program Manager *track* overall progress from the **Key Performance Indicator Dashboard.**

➢ Track and manage **Caseloads** and **Home Visitors' FTE** in order to effectively assign new Cases
➢ Review **Home Visit Completion Rates** of Home Visitors
➢ Evaluate key metrics, such as the **Home Visit Completion Rate at the Agency level** and the current count of **Enrolled Focus Children**

Features Utilized:
- HFO 2.22 Key Performance Indicator Framework
- HFO 2.23 Home Visit Completion Rate Indicator
- HFO 2.24 Agency Home Visit Completion Rate Indicator
- HFO 2.25 Caseload Indicator
- HFO 2.30 Enrolled Focus Child Count Indicator
- HFO 2.26 Employee Module