



Sedgwick County Healthy Babies Schedule-at-a-Glance Report Guide



The Schedule-at-a-Glance report provides program staff and supervisors with a schedule of up-coming client appointments, including expected documentation to be completed at that appointment. The schedule in the report is dependent on accurate and complete data entry in the DAISEY system.

Data Elements for Accuracy of Scheduling

The following forms and questions are used by the report to populate the schedule displayed in the report dashboard.

1. Enrollment – Scheduling Form

Enrollment date	Enter date of initial enrollment. This date should precede the first scheduled home visit.
Type of enrollment	Response options include <i>Initial prenatal visit</i> , <i>Post-partum welcome home visit</i> , and <i>ICC (not pregnant, greater than 12 weeks postpartum)</i> . This response determines which forms are required at the first home visit.
Home visitor	Response options include list of home visitor names in drop-down, single-select format; list is revised as requested by Sedgwick County supervisor.
Date	Enter date of first scheduled home visit following enrollment. This date is used to populate the home visit date displayed in the Scheduling Report. If left blank, a Client Contact form will be required before the first home visit for the report to recognize that a first home visit has been scheduled. If a Client Contact form is not then completed, Enrollment will show as Incomplete in the report.

2. Home Visit Documentation (HV Doc)

Date of Activity	Enter date home visit occurs.
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Is this a prenatal or post-partum visit?	Response options include <i>prenatal</i> and <i>postpartum</i> . (Note: data point used for Demographics dashboard only.)
Please indicate what additional visits are needed with this client	Response options include <i>Initial prenatal visit</i> , <i>Follow-up prenatal visit</i> , <i>Post-partum welcome home visit</i> , <i>Follow-up post-partum visit</i> , and <i>No additional visits needed</i> . The response will determine what type of visit comes next or if the client is to be discharged. The type of visit selected will determine what forms display as being needed at the next visit in the Scheduling Report.
Do you need to assign this client to another staff member?	A new home visitor can be assigned. This will be reflected in the report for any home visits scheduled after the date of activity on the associated HV Doc.
Home visitor	Enter name of home visitor to whom the client needs to be reassigned.
Date	Enter date of next scheduled home visit. This date appears in the Scheduling Report as the next scheduled visit.

3. Client – Contact Form

Date of Activity	Enter date contact or attempted contact occurs.
Please indicate what additional visits are needed with this client	Response options include <i>Initial prenatal visit</i> , <i>Follow-up prenatal visit</i> , <i>Post-partum welcome home visit</i> , <i>Follow-up post-partum visit</i> , and <i>No additional visits needed</i> . The response will determine what type of visit comes next or if the client is to be discharged. The type of visit selected will determine what forms display as being needed at the next visit in the Scheduling Report. If left blank, the report will not consider this form and will look back to the preceding HV Doc or Client Contact form to determine next scheduled visit.
Date	Enter date of next scheduled home visit. This date appears in the Scheduling Report as the next scheduled visit.
Do you need to assign this client to another staff member?	A new home visitor can be assigned. This will be reflected in the report for any home visits scheduled after the date of activity on the associated Client Contact form.
Home visitor	Enter name of home visitor to whom the client needs to be reassigned.

4. Client – Discharge Form

Date of Activity	Enter date discharge form is completed.
Discharge Date	Enter official date of discharge. This date is used in reports for when client officially exists services.

5. Other assessment forms use Date of Activity* to reflect completed status in the Scheduling Report

**Unless otherwise noted in the table below*

First Prenatal Visit	Background Info – 2nd form tab <i>(note: date completed in report is the date the form was last modified)</i> HV Doc EPDS PN Screen PN Substance use SG Safety
Follow-up Prenatal Visit	HV Doc
First Post-partum Visit <i>(note: this label indicates client enrolled postpartum and is starting services vs enrolling prenatal and then continuing service after birth of child)</i>	Background Info – 2nd form tab <i>(note: date completed in report is the date the form was last modified)</i> Child Profile <i>(note: date completed in the report is the Enrollment Date entered into the Child Profile)</i> HV Doc EPDS IC Adult Postpartum IC Child Visit IC Newborn IC Safe Sleep One Key Question PN Substance use SG Safety
Post-partum Welcome Home Visit <i>(note: this label indicates client enrolled prenatally and then continued service after birth of child)</i>	Child Profile <i>(note: date completed in the report is the Enrollment Date entered into the Child Profile)</i> HV Doc IC Adult Postpartum IC Child Visit IC Newborn IC Safe Sleep One Key Question
Follow-up Post-partum Visit	HV Doc

[Client Schedule At-A-Glance Dashboard](#)

Parameters & Filters

Upon opening the report, **Start Date** and **End Date** default to view the schedule for the next two weeks from today. The Start and End dates can be modified as needed. Rows included in the dashboard are clients scheduled for home visits (Date Scheduled) as well as any missed or incomplete records.

Note: Any client with a completed Client Discharge Form is removed from the report when the Start Date is after the Discharge Date (as entered on the Client Discharge Form).

The dashboard display can be filtered by Client Name (ID), Home Visitor, Activity, and Visit Type. A sorting feature allows the display to be sorted by Date Scheduled, Date Completed, First Name, or Last Name.

Dashboard Details

The bar along the top of the dashboard, just below the filters, provides a snapshot of the number of scheduled assessments and the status of those assessments, based on the filters selected. Clicking on any of the categories or colors will filter the dashboard to display just those records. E.g., clicking on the green bar (Missing), the report will update to display only those 35 missing records.



Date Scheduled: date of next appointment as entered into the Enrollment form, HV Doc, or Client Contact form.

Visit Type: as selected on the Enrollment form, HV Doc, or Client Contact form.

Activity: the assessments or documentation expected to be completed at the scheduled home visit (e.g., HV Doc, PN Screen, EPDS). Note: not all required forms are included in the report. Check with your supervisor to ensure you are meeting all data collection and reporting requirements.

Date Completed: for most activity forms, this is the date of activity on the form. Exceptions include:

- *Child:* this is the Child Profile. Date Completed = Enrollment Date as entered into the child profile.
- *Enrollment:* this is the Enrollment – Scheduling form. Date Completed = Enrollment Date as entered on the form.
- *Background Info – 1:* this is the All – Background Info form. Date Completed = Date of Activity as entered on the form. It is expected that the first tab of the Background form is completed at enrollment and before the first home visit.
- *Background Info – 2:* this is the All – Background Info form. Date Completed = date last modified. It is expected that the second tab of the Background form is completed at the first scheduled home visit following enrollment, and the “date last modified” is used to capture when the Background form was modified to fill in the 2nd tab questions.
- *Discharge:* Date Completed = Discharge Date as entered on the form.

Workflow Highlight: Families attending post-partum visits and who become pregnant again, the family needs to be discharged (select “No additional visits needed” on last post-partum follow-up visit HV Doc or Client Contact form and submit a Discharge Form) and then re-enroll as a Prenatal client (i.e., create new Enrollment – Scheduling Form and Background Info Form). The new enrollment date should fall at least one day following discharge from the post-partum enrollment.

Example of fake client who enrolled Post-partum (10/1/2022), then discharged (at post-partum follow-up visit on 10/17/2022) and re-enrolled as Prenatal client (on 10/18/2022). New Enrollment and Background Info forms have been created for the second enrollment.

Client Name (ID)	Date Scheduled	Visit Type	Activity	Date Completed	
Mary Joy Test1_pp enroll (1048-20001)	10/1/2022	Enrollment	Bkgd Info - 1	10/1/2022	CoT
			Enrollment	10/1/2022	CoT
Mary Joy Test1_pp enroll (1048-20001)	10/10/2022	First Post-partum	Bkgd Info - 2	Null	M
			Child	10/1/2022	CE
			EPDS	Null	M
			HV Doc	10/10/2022	CoT
			IC Adult Postpartum	Null	M
			IC Child Visit	10/10/2022	CoT
			IC Newborn	Null	M
			IC Safe Sleep	Null	M
			One Key Q	Null	M
			PN Substance Use	10/10/2022	CoT
			SG Safety	Null	M
			Mary Joy Test1_pp enroll (1048-20001)	10/17/2022	Discharge
Follow-up post-partum visit	HV Doc	10/17/2022			CoT
Mary Joy Test1_pp enroll (1048-20001)	10/18/2022	Enrollment	Bkgd Info - 1	10/18/2022	CoT
			Enrollment	10/18/2022	CoT
Mary Joy Test1_pp enroll (1048-20001)	10/25/2022	First Prenatal	Bkgd Info - 2	11/1/2022	CL
			EPDS	Null	M
			HV Doc	10/25/2022	CoT
			PN Screen	Null	M
			PN Substance Use	10/25/2022	CoT
Mary Joy Test1_pp enroll (1048-20001)	11/2/2022	Discharge	SG Safety	Null	M
			Discharge	Null	M

Data Quality Check: If information displayed in the tables seems inaccurate, review the relevant profiles and/or activity forms in DAISEY to ensure data has been entered correctly (e.g., accurate date of activity, correct selection of type of visit, date and type entered for next scheduled visit). If you believe data is not displaying correctly in the report, send an inquiry to DAISEY Support (daisey-sedgwick@ku.edu).

Demographics Dashboards

Demographics

This dashboard allows staff to review a single demographic for clients active at least one day between the selected Start Date and End Date. “Active” is determined by the enrollment and discharge dates entered into the Enrollment – Scheduling Form and Client – Discharge Form.

Demographics available to review:

Sex	Primary Healthcare Coverage
Race	Zipcode
Ethnicity	City of Residence
Primary Language	Well Visit During Last 12 Months
Marital Status	Special Healthcare Need or Disability
Education Level	Number of Children Under 12 Years of Age
Current Student	Household Size
Employment	Annual Household Income

Demographics can be filtered by Client Name, Home Visitor, Prenatal or Postnatal, and Healthy Start Zipcode.

Home Visitor filter: Demographic information will be associated with the most recently designated home visitor within the selected date range. This information is pulled from either the HV Doc or the Client Contact Form when a new home visitor is to be assigned. If no change in home visitor is indicated, the name of the home visitor is pulled from the Enrollment - Scheduling Form. The new home visitor name is assigned to any activity forms dated from the day after the date of the requested change.

Prenatal or Postnatal filter: The most recent prenatal vs postnatal status within the selected date range (as entered on the latest HV Doc within the range) will determine which category a client's data will fall under in the Demographics dashboard. This information is pulled from the question *Is this a prenatal or post-partum visit?* in the first section of the Home Visit Documentation form. If no HV Doc exists following enrollment, then the prenatal vs postnatal status will pull from the Enrollment - Scheduling Form.

The list of caregivers that make up the selected demographic counts are available in the table on the righthand side of the dashboard.

Demographics Crosstab

This dashboard contains the same list of demographic variables. Two demographic variables can be selected to create a crosstab table. Filters function the same as on the single demographic dashboard.