



Iowa Home Visiting Scheduling & MIA Report



This guide provides technical information and additional program instructions for users accessing the Scheduling & MIA Report for the Iowa Home Visiting DAISEY module.

The Iowa Home Visiting Scheduling & MIA Report allows family support professionals and program managers to determine what tasks are ahead as well as review the overall completion status of each task.

Tasks will show up when a task is first eligible to be completed for actively enrolled primary caregivers and their children during the selected date range. Due dates for activities are defined by program guidelines outlined in the [Iowa Home Visiting Form & Activity Requirements](#).

The follow – up column indicates referral action. Referral actions are relevant for ASQ-3, EPDS, Primary Caregiver EAR (tobacco cessation), and Relationship Assessment forms in DAISEY.

Report Filters

Parameters will be applied to each dashboard when modified. Users will only be able to access data according to their access assignment(s) in DAISEY. The following filters and parameters can be used to change the data displayed in the report.

Start Date and End Date allows selection of any date range of interest. Dates will default to the current fiscal year.

Home Visitor allows selection of home visitors who have their names in the Family Support Professional field on a caregiver profile.

*** Home Visitors may have entered their name more than one way on the primary caregiver profile (Sally, Sally Smith, Sally S.). All versions will appear in the report despite being the same person. By selecting the HV name on the Caseload Tasks dashboard, it will list all families with that HV name listed. They can note the families where the name is listed incorrectly and make the change in DAISEY. The home visitor name should be consistent in DAISEY for the most accurate data.**

Primary Caregiver Name (ID) filters by primary caregivers.

Activity allows for the selection of one or more specific DAISEY forms/activities.

Grantee allows selection of one or more DAISEY grantees, with access limited to only grantees assigned to the DAISEY user.

Organization allows selection of one or more DAISEY organizations, with access limited to only organizations assigned to the DAISEY user.

Follow - up allows filtering to see follow up actions needed from ASQ-3, Primary Caregiver EAR (tobacco cessation), EPDS, or Relationship Assessment forms in DAISEY requiring referral and/or referral completion. To see all referral opportunities, filter to completed and not yet completed options.

Definitions

Date Eligible: The first day a task can be completed. For example, a postnatal enrollee client will first be eligible for an EPDS at enrollment because it is due within 3 months of enrollment.

Due Date: The last day a task can be completed. For example, a postnatal enrollee client's due date for an EPDS would be Enrollment Date + 3 months.

Completion Status Categories

Activities are listed by the following categories:

Not Yet Eligible: Today is before Date Eligible for the task.

Not Yet Completed: Today is between Date Eligible and Due Date and no activity has been completed during this window. (Note: if assessment is completed early, the 'Not Yet Completed' status will remain in reports until the Due Date, at which time, the status will change to 'Completed Early'.)

Completed on Time: The task has been completed between its Date Eligible and Due Date window.

Completed Late: Today is after the Due Date and an activity has been completed after the Due Date.

Completed Early: Today is after the Due Date and an activity has been completed before the Date Eligible. Furthermore, tasks completed before their Date Eligible are counted as 'Not Yet Completed' between their Date Eligible and Date Due, and then 'Completed Early' after the Date Due has passed.

Missing: Today is after the Due Date and no activity has been completed.

***It's important to note that if an activity is completed far past the due date, it may**

remain in the Missing category once completed since it does not meet the completion window guidelines, which may undermine screener results.

What Is Counted

All activities of primary caregivers and their children who are actively enrolled and have a task eligible for completion during the date range selected.

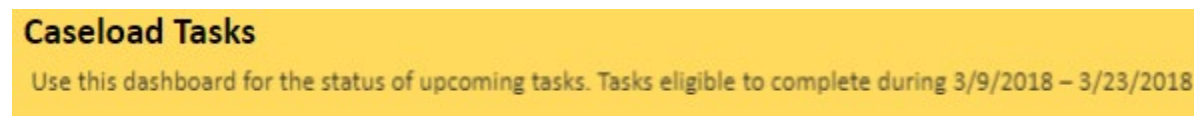
What Is Not Counted

- Caregiver Profile
- Child Profile
- IHV Staff Profile
- Home Visit Review Form

Caseload Tasks Dashboard

The Caseload Tasks dashboard is designed to provide DAISEY users with a snapshot of tasks that are coming due during the selected range.

The header of this report indicates the date range selected (Figure 1).



Once the filters are selected, the report will show a stacked bar graph displaying the count of tasks by completion status, as well as a table providing details on each task eligible for completion.

Example: A home visitor would like to see the status of tasks coming due in the next month for all the families they work with.

First, select the appropriate date range (Figure 2):

Start Date	End Date
9/1/2023	9/30/2023

Next, use the Home Visitor filter to select the appropriate Home Visitor (Figure 3)

Home Visito 

B 

☐ (All)

☐ A

☒ B

***NOTE: Home Visitors may have entered their name more than one way on the primary caregiver profile (Sally, Sally Smith, Sally S.). All versions will appear in the report despite being the same person. By selecting the HV name on the Caseload Tasks dashboard, it will list all families with that HV name listed. They can note the families where the name is listed incorrectly and make the change in DAISEY. The home visitor name should be consistent in DAISEY for the most accurate data.**

The total number of tasks eligible for completion in the range for the selected home visitor are represented in the top bar, while the table below provides a detailed breakdown of those tasks by associated DAISEY Name and ID (Figure 4). To select activities due for a specific family, unselect "All" and select the specific DAISEY ID or name in the Primary Caregiver Name drop-down menu of the client you would like to see.

Home Visitor: B
Primary Caregiver: All

	Not Yet Completed 189					Completed on Time 40
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Date Eligible	Date Completed	Date Due	Name (ID)	Activity	Timing	
12/16/2017	12/28/2017	2/15/2018	Child (736-10411)	ASQ-3	4 mo	☐
1/2/2018	1/11/2018	2/15/2018	Caregiver (729-23033)	EPDS	2 wk	☐
12/18/2017	1/19/2018	2/16/2018	Caregiver (736-24503)	EPDS	3 mo	☐
8/19/2017	11/20/2017	2/18/2018	Child (736-14281)	ASQ:SE	6 mo	☐
12/21/2017	Null	2/20/2018	Child (736-15141)	ASQ-3	2 mo	☒
12/23/2017	1/18/2018	2/21/2018	Caregiver (736-24842)	EPDS	6 mo	☐

Sort Order
Date Due

To see certain categories, click on the bar and select "Keep Only" or "Exclude" to individualize the report (Figure 5). Also, simply selecting and then deselecting a category in the bar will also alter the results in the table.

☒ Keep Only ☒ Exclude 

Completion Status: Not Yet Completed
Today is between Date Eligible & Due Date, and no activity has been completed during this window.

Tasks: 115
Total Tasks: 137
Percent of Tasks: 84%

This table lists when a task is first eligible, the date the task was completed (NULL if not yet completed), when the task is due, name of the person who is eligible, name of the task, which timing of the task is due, and the status of the task, i.e. NYC (Not Yet Completed) or CoT (Completed on Time).

If there is confusion as to why a completed DAISEY activity is pulling into a completion category, the report logic and criteria for that activity can be viewed by hovering over the completion status bar in the table (Figure 6).

Name (ID):	Caregiver (639-28566)
Primary Caregiver (ID):	Hidden Name (639-28566)
Enrollment Date:	10/26/2240
Discharge Date:	
Child Date of Birth:	*(corrected for ASQ-3: *)
Home Visitor:	M
Activity:	LSP
Timing:	ongoing
Date Eligible:	5/2/2021
Date Completed:	7/28/2021
Due Date:	7/2/2021
Completion Status:	Completed Late
Today is after the Due Date, and an activity has been completed after the Due Date.	
ASQ-3	ongoing
LSP	ongoing
	CL

Follow-up Column

The follow-up column on the Caseload Tasks dashboard indicates the need for referral action. This column is relevant for EPDS, ASQ-3, Relationship Assessment, and Primary Caregiver EAR (tobacco cessation) forms only. When responses to questions on the included forms indicate that a referral is needed, per data dictionary guidance, an open box will appear in the follow-up column. When the referral has been appropriately completed per data dictionary guidance, a checkmark will appear in the box. Below is an example of Tobacco Cessation referrals needed for the Primary Caregiver EAR form. The Tobacco Cessation Referral is now available to filter via the Activity filter. In the example below, some of the referrals have been appropriately completed while others have not. The snapshot below shows some activities completed with a checkmark and others remain open without a checkmark to indicate referral action is incomplete.

Activity	Primary Care
Tobacco Cessatio...	(All)
☐ (All)	
☐ AOD	
☐ ASQ-3	
☐ ASQ:SE	
☐ EAR - Primary Caregiver	
☐ EAR - Target Child	
☐ EPDS	
☐ LSP	
☐ PCI	
☐ Relationship Assessment	
☒ Tobacco Cessation Referral	

Missing 12	Completed on Time 5
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Activity	Timing		Follow-up
Tobacco Cessation Referral	enrollment	M	☐
Tobacco Cessation Referral	enrollment	M	☐
Tobacco Cessation Referral	enrollment	CoT	☒
Tobacco Cessation Referral	enrollment	M	☐
Tobacco Cessation Referral	enrollment	M	☐
Tobacco Cessation Referral	enrollment	CoT	☒
Tobacco Cessation Referral	enrollment	M	☐
Tobacco Cessation Referral	enrollment	M	☐
Tobacco Cessation Referral	enrollment	M	☐
Tobacco Cessation Referral	enrollment	M	☐
Tobacco Cessation Referral	enrollment	M	☐
Tobacco Cessation Referral	enrollment	CoT	☒
Tobacco Cessation Referral	enrollment	M	☐
Tobacco Cessation Referral	enrollment	M	☐
Tobacco Cessation Referral	enrollment	CoT	☒
Tobacco Cessation Referral	enrollment	M	☐
Tobacco Cessation Referral	enrollment	NYC	☐
Tobacco Cessation Referral	enrollment	CoT	☒

Below is an example of ASQ-3 referral prompts. One referral has been completed and received a checkmark and one appears as an open box, indicating referral action is still needed.

Primary Caregiver Name (ID)

(All)

Activity

ASQ-3

Grantee

(All)

Organization

(All)

Sort Order

Date Due

e

Not Yet Completed

255

Activity	Timing	Follow-up
ASQ-3	30 mo	CoT
ASQ-3	2 mo	CoT
ASQ-3	24 mo	CoT
ASQ-3	30 mo	M
ASQ-3	2 mo	CoT
ASQ-3	48 mo	CoT
ASQ-3	4 mo	CoT
ASQ-3	48 mo	M
ASQ-3	2 mo	CoT
ASQ-3	24 mo	CoT
ASQ-3	4 mo	CoT
ASQ-3	2 mo	CoT
ASQ-3	4 mo	CoT
ASQ-3	2 mo	CoT
ASQ-3	12 mo	CoT

Below is an example of appropriate EPDS referral action in several instances, with all follow-up action column boxes completed with a checkmark.

Activity

EPDS

Grantee

(All)

Organization

(All)

Sort Order

Date Due

Completed on Time

57

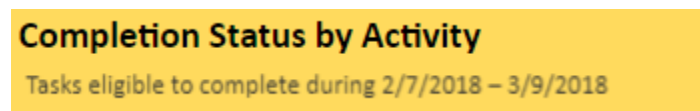
Completion Status Dashboard

The Completion Status dashboard is designed to provide DAISEY users with an overview of tasks eligible for completion listed by completion status. The dashboard is intended to allow organizations to review their task completion for a selected date range and assess their success rate with completing tasks in a timely manner. The dashboard displays Completion Status labels above completion status bars for each task represented in the date range and organization, and a list on the right displays the breakdown of task completion status by Name and DAISEY ID.

Program managers or supervisors should run the Completion Status dashboard at least quarterly to monitor task completion.

Programs may use this dashboard to track progress related to data quality improvement plans or other quality improvement projects focused on task completion.

The header of this report indicates the date range selected (Figure 7).



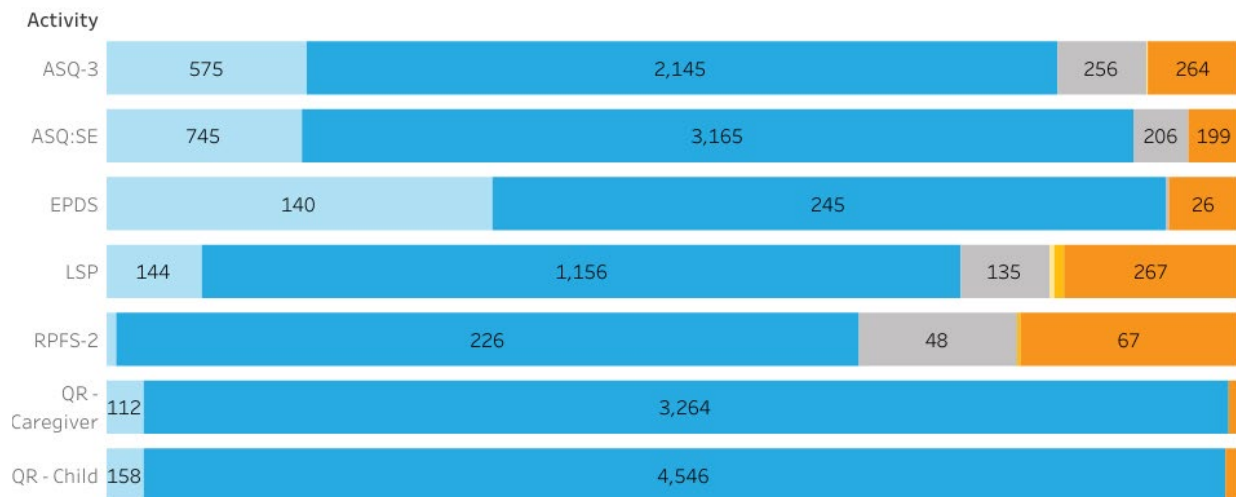
Any filters applied to the Caseload Tasks dashboard will also be applied to the Completion Status dashboard, so you may want to select new filters on this dashboard. Once the filters are selected, stacked bars will display each activity selected in the filter.

Example: A supervisor would like to review program activity completion for the previous calendar month and determine whether any tasks are frequently showing as “Missing” or “Completed Late.”

First, select the appropriate range (Figure 8).

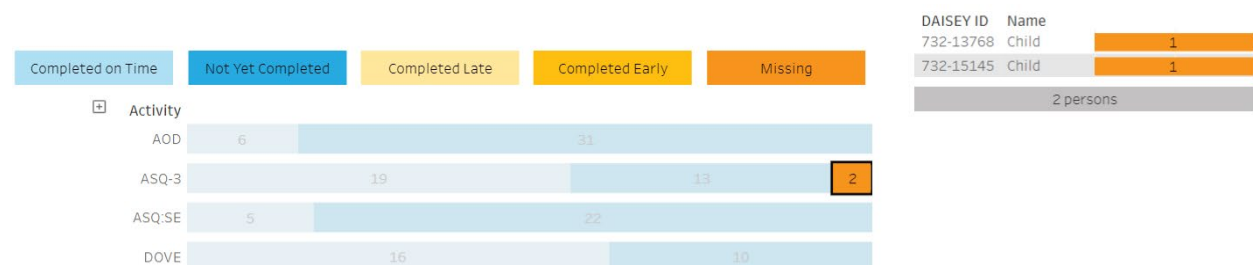
Start Date	End Date
9/1/2023	9/30/2023

The report will show each activity that was eligible for completion within the selected range, as well as a breakdown by DAISEY ID and participant name on the right side of the dashboard (Figures 9 & 10) for those that were eligible for an activity.

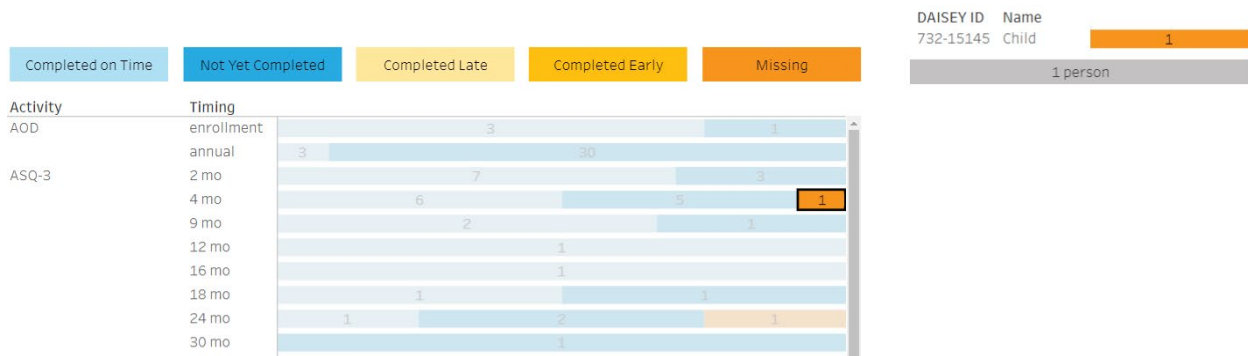


729-16426	Child	2	1
729-11678	Child	3	0
729-18137	Child	1	3
729-14615	Child	2	1
729-13994	Child	2	1
729-11507	Child	1	2
729-16337	Child	1	2
729-11615	Child	1	2
729-17192	Child	1	2

To see the “Missing” ASQ-3’s, select the orange section of the ASQ-3 bar and the list on the right will reflect clients missing the ASQ-3 (Figure 11). This function applies to all Completion Status categories.



To determine which ASQ-3 timing is missing, select the “+” symbol to the left of the Activity heading as shown in Table 6. Each activity will have the required timings listed. Find the missing items and select them, and the list on the right will provide the DAISEY ID of the client missing that assessment (Figure 12).



MIA Dashboard

The MIA dashboard is designed to assist supervisors and family support workers with identifying missing or incorrect data to ensure a complete and correct dataset is represented.

The header of this report highlights the date range selected as well as indicating that this dashboard includes data on missing activities (Figure 13). Missing demographics information can be found in a separate report – the Missing Demographics Report.

Missing Data Report - Activities

Tasks eligible to complete during 1/1/2023 – 1/31/2023

Start Date	End Date	Home Visitor	Activity	Grantee	Organization
1/1/2023	1/31/2023	(All)	(All)	(All)	(All)

Home Visitor, Activity, Grantee, and Organization filters are consistent across the report. Click in the Start or End Date box to manually enter dates of interest (mm/dd/yyyy) or use the pop-up calendar to navigate to the preferred date range (Figure 14).

Start Date	End Date
10/1/2019	9/30/2020

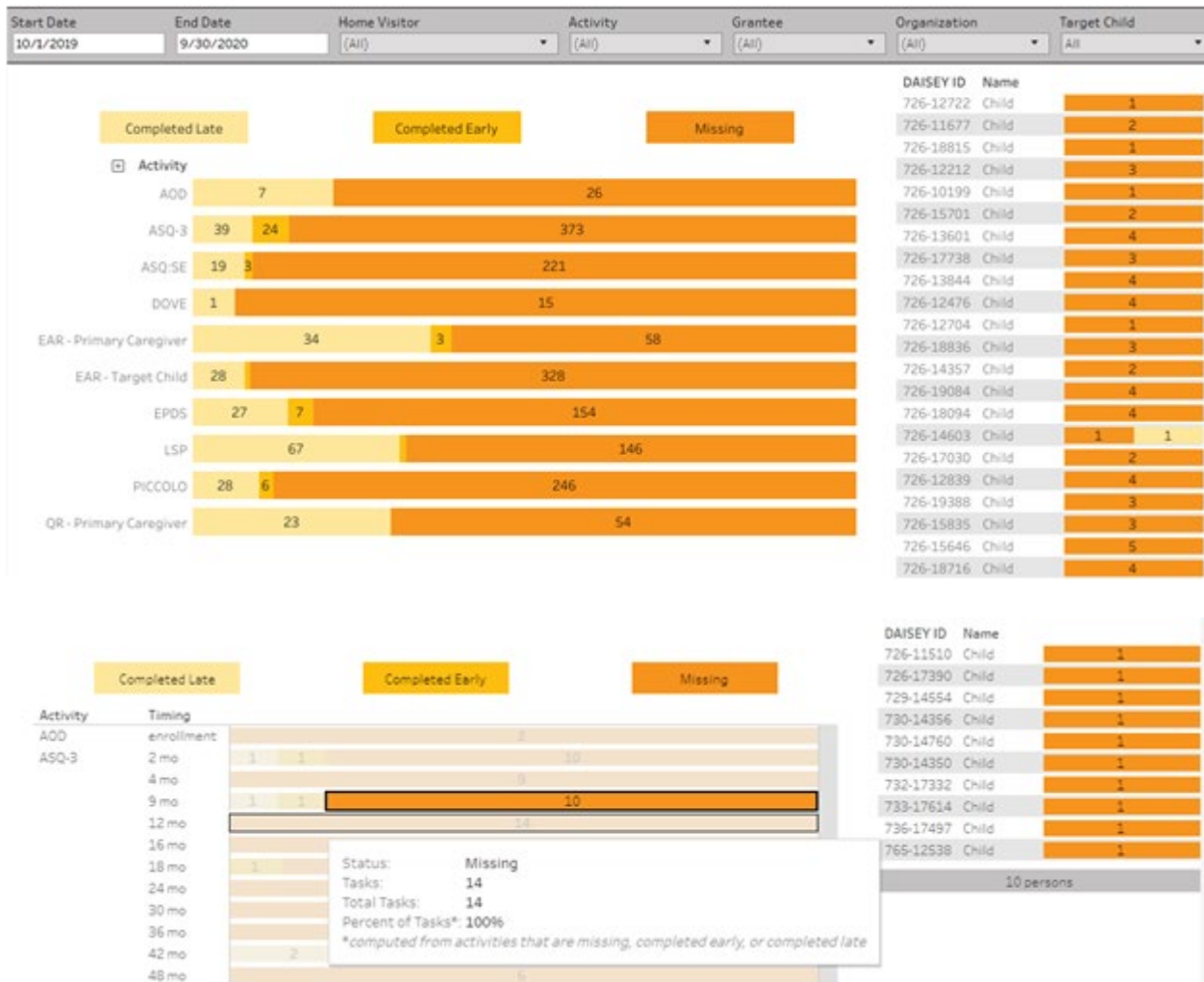
< October 2019 >

S	M	T	W	T	F	S
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

Today: August 2020

All activities are displayed on a single dashboard, with different color bars highlighting activities Completed Late, Completed Early, and Missing. Not Yet Eligible or Completed on Time are not included in this dashboard.

To determine which activity timing is missing, select the “+” symbol to the left of the Activity heading as shown in Figure 10. Each activity will have the required timings listed. Click on the missing bar for the activity of interest, and the list on the right will provide the DAISEY ID of the client missing that assessment (Figure 15). Additionally, also as seen in Figure 16, hover over any bar and a tooltip will appear, providing additional information about the data contributing to that bar.



<u>Activity</u>	<u>Timings</u>	<u>Date Eligible</u>	<u>Date Due</u>
AOD	Within 6 months of Enrollment Date	Enrollment Date	6 months from Enrollment Date
*ASQ-3	4 months, 9 months, 12 months, 18 months, 24 months, 30 months, 36 months, 48 months, 60 months	"Timing" Date Eligible	"Timing" Date Due
ASQ:SE-2	2 months, 6 months, 12 months, 18 months, 24 months, 30 months, 36 months, 48 months, 60 months	"Timing" Date Eligible	"Timing" Date Due
EPDS Enrollment	Other, Not screened – Already in services	Enrollment Date	3 months from Enrollment Date
EPDS prenatal	6-12 weeks postnatal, Not screened – Already in services	Child birthdate + 6 weeks	Child birthdate + 12 weeks
LSP Initial	within 1 month of Date of Enrollment	Enrollment Date	1 month from Enrollment Date
LSP Ongoing	every 6 months from Date of Enrollment	2 months before Date Due	within 6 months of Enrollment anniversary
LSP Discharge	Discharge Date	Discharge Date – 1 month	Discharge Date
Primary Caregiver & Child Enrollment Reports (EAR)	Within 15 days of Date of Enrollment	Enrollment Date	Enrollment Date + 15 days
Primary Caregiver & Target Child Annual Report (EAR)	Once per FY (after the year in which the Enrollment was completed)	FY Begin	Discharge+15 days or FY End+15 days, whichever is earlier

**CHEERS	Twice per FY for children 4-36 months old	Enrollment Date or 4mo from child DOB, whichever is later	Discharge date, FY end, or 1 day before 36 month mark of child DOB, whichever is earlier
**DANCE	1-3 months, 8-10 months, 15-17 months, & 21-23 months postpartum	"Timing" Month Eligible	"Timing" Month Due
**PICCOLO	Once per FY for children 4-47 months old	FY begin or 4mo from child DOB, whichever is later	Discharge date, FY end, or 1 day before 48 month -1 day from child DOB, whichever is earlier
Relationship Assessment Tool Initial	within 6 months of Date of Enrollment	Enrollment Date	6 months from Enrollment Date
Relationship Assessment Tool Annual	Once per FY (after the year in which the Enrollment was completed)	FY Begin	FY End
Retrospective PFS-2	Not included in Scheduling Report	N/A	N/A

***On a submitted ASQ-3 form, if a response of "The child is enrolled into Early Intervention services and I could not get ASQ-3 scores" OR "The child is enrolled into Early Intervention services and their AEA does not use the ASQ-3" to question, "If this tool was unable to be completed, please specify why:" the child will no longer be prompted for ASQ-3 screener completion by the Scheduling Report.**

****The Scheduling Report will prompt for the appropriate Parent Child Interaction Form based on the response to "Model" question on the Caregiver Profile.**

HFA: CHEERS PAT: PICCOLO NFP: DANCE EHS: PICCOLO IFSC- Home Visiting: PICCOLO IFSC- Group Education: No PCI Required

PICCOLO forms completed after the due date will appear as Missing.