



WIHV Report Guide: WIHV Home Visit Tracker Report



This guide provides an overview of the WIHV Home Visit Tracker Report.

What is the purpose of this report?

The WIHV Home Visit Tracker Report provides both a current snapshot of all active families' expected frequency and their most recent home visit, as well as an overview of historical expected vs actual home visit frequency data, displayed by home visitor and caregiver. The report will enable you to quickly identify and address instances where you may need to review the expected frequency of a given family, and identify if you are reaching their target home visit frequency for each family they serve.

How this report calculates expected visits:

Actual vs Expected Home Visits by Home Visitors and Caregivers				
Home Visitor	Primary Caregiver	Expected Visits	Home Visits Completed during Expected Frequency Periods	Percent of Expected Visits Completed
Home Visitor 1	Primary Caregiver (664-20060)	26.97	26	96.4%
	Primary Caregiver (664-20061)	19.20	32	166.7%

When navigating through this report, you will see a count of 'Expected Visits' in tooltips and on the Actual Versus Expected Visits dashboard. The report calculates this as an exact value over the selected date range, determined by the Expected Frequency forms completed during and prior to the range, and the days that the family was actively enrolled in the range. For example:

- You are looking at the actual vs expected home visits for the Doe family from October 1st, 2018 – December 31st, 2018
- They completed the following Expected Frequency Forms relevant to that date range:
 - September 1st, 2018, with an expected frequency of 'Weekly' (this was the most recently completed EFF before the selected date range, which establishes the expected frequency as of the Start Date)
 - October 15th, 2018, with an Expected Frequency of 'Monthly'
 - December 1st, 2018, with an Expected Frequency of '2x a month'
- The Doe family discharged on December 15th, 2018.

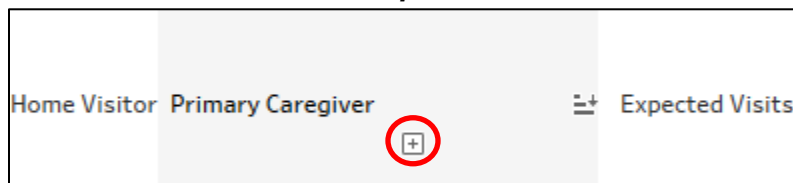
- This means that the report will calculate a total based on the number of days for each expected frequency in which the Doe family was actively enrolled:
 - October 1st – October 15th: Weekly (1/7 expected visits per day) = 2.14 expected visits
 - October 15th – December 1st: Monthly (1/30.4 expected visits per day) = 1.51 expected visits
 - December 1st – December 15th: 2x a month (1/15.2 expected visits per day) = .99 expected visits
- Based on the calculation, the Doe family had 4.64 expected visits in the selected date range.

Because you will likely never see an 'Expected Visits' value match a 'Home Visits Completed during Expected Frequency Periods' value, you are encouraged to look at the 'Percent of Expected Visits Completed' for an idea of how closely you are matching the expected visit frequency. Additionally, the Actual Versus Expected Visits dashboard will show a count and percentage of your enrolled families who completed 75% or more of their expected visits in the date range.

Please also note that Home Visits completed prior to entering an Expected Frequency Form will appear on the "Relevant Expected Frequency Form List" on the Actual Versus Expected Visits dashboard, but are not counted towards the 'Percent of Expected Visits Completed.'

This calculation is intended to give an as accurate as possible representation of actual vs expected visits for any actively enrolled family in any selected date range, but you are encouraged to use this data as well as the 'Relevant Expected Frequency Form List' to contextualize this information.

Dashboard actions in this report:



In the Actual Versus Expected Visits dashboards of this report, the data is displayed as an interactive table. By clicking the + or – button below the Home Visitor, Primary Caregiver, or Caregiver (which would show any data associated with any secondary and primary caregivers) columns, you can expand or contract the table to organize it by any of those columns. The expected frequency data will then expand or be consolidated accordingly.

Filters used in this report:

You can filter data on this report by Start/ End Date, Grantee, Organization, Home Visitor, Primary Caregiver, Home Visiting Model, and Enrollment Type. Additional filters are available for each dashboard:

- The Current Status dashboard allows you to filter results by the Current Expected Frequency.
- The Actual Versus Expected Visits dashboard allows you to filter by families who completed 75% or more of the expected visits.
- The Data Explorer dashboard allows you to slice and sort the data by a number of dimensions, such as Home Visitor, Primary Caregiver, and Expected Frequency.
- The Trends dashboard allows you to aggregate your results by week, month, quarter, or year, and to change the reference percentage to any level you choose (it defaults to 75%)

Note: When using the Home Visiting Model or Enrollment Type filters, the option for 'Missing' will filter the report results to caregivers who are missing a response to those questions on the WIHV Caregiver Profile. The option for 'Null' will show any caregivers who have Expected Frequency or Home Visit forms completed within the selected Start and End Dates, but are not actively enrolled within the selected Start and End Dates.

Start Date	End Date	Grantee	Organization	Home Visitor	Primary Caregiver	Home Visiting Model	Enrollment Type	Slice visits by	Sort
1/1/2018	12/31/2018	(All)	(All)	(All)	(All)	(All)	(All)	Caregiver	By Expected Visits

Dashboard 1: Current Status

The Current Status dashboard shows a list of all of your organization's actively enrolled families by primary caregiver and home visitor, with their Current Expected Frequency, and information on when the most recent Expected Frequency Form and Home Visit occurred. This will allow you to quickly assess the current caseload for your site's home visitors, and whether any of your enrolled families are due to have their expected frequency updated.

WIHV Home Visit Tracker Report Current Status						
Grantee	Organization	Home Visitor	Primary Caregiver	Home Visiting Model	Enrollment Type	Current Expected Freq
(All)	(All)	(All)	(All)	(All)	(All)	(All)
Today's Date: 2/20/2019						
All caregivers enrolled as of today						
Home Visitor	Caregiver	Current Expected Frequency	Current Expected Frequency Form	Days Since Current Expected Frequency Form	Most Recent Home Visit	Days Since Most Recent Home Visit
Home Visitor 7	Caregiver (665-20197)	2x per month	12/10/2018	72	2/5/2019	15
Home Visitor 8	Caregiver (665-20201)	2x per month	12/21/2018	61	2/13/2019	7
Home Visitor 8	Caregiver (665-20206)	2x per month	1/15/2019	36	2/14/2019	6
Home Visitor 5	Caregiver (665-20207)	2x per month	1/18/2019	33	2/8/2019	12

Dashboard 2: Actual Versus Expected Visits

The Actual Versus Expected Visits dashboard shows the count of actual home visits, the calculated total of expected visits, and the percentage of actual vs expected home visits for all actively enrolled families in the selected date range. This can be displayed by home visitor, primary caregiver, or caregiver in the table.

Home Visitor	Primary Caregiver
Home Visitor	Primary Caregiver (685-20197)
1	Primary Caregiver (685-20199)
	Primary Caregiver (685-20200)

Upon selecting a home visitor or caregiver, the 'Relevant Expected Frequency Form List' will populate with all of the Expected Frequency form dates of activity, Home Visit dates of activity, and the expected frequency denoted by each Expected Frequency form.

Relevant Expected Frequency Form List - Please Select a Caregiver		
Selected Caregiver: Primary Caregiver (685-20197)		
Date of Activity (Expected Frequency)	Expected Frequency	Date of Activity (Home Visit)
8/22/2018	Weekly	8/22/2018
8/29/2018	Creative Outreach / N..	Null

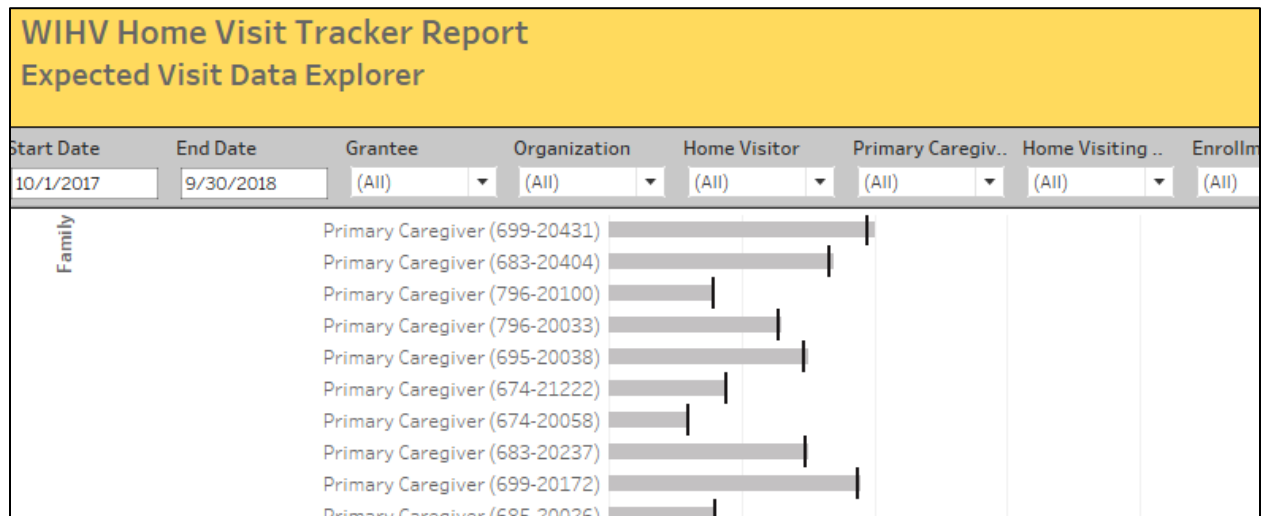
This will allow you to review the history of expected frequency for any caregiver or home visitor in their organization.

Finally, on the bottom of the dashboard the report displays an overall count of actively enrolled Primary Caregivers, a count of Primary Caregivers Completing 75% (or more) of their Expected Visits, and the percentage of Primary Caregivers Completing 75% (or more) of their Expected Visits.

Primary Caregivers Completing 75% of Expected Visits	Primary Caregivers	Percent of Primary Caregivers Completing 75% of Expected Visits
1,198	2,194	54.6%

Dashboard 3: Data Explorer

The Data Explorer dashboard provides you with a customizable tool for visualizing home visit and expected frequency data for any selected date range. By using the “Slice visits by” menu, you can see their expected frequency data for their entire organization, or by home visitor, family, caregiver, enrollment type, home visiting model, or expected frequency. You can then sort the data by Expected Visits, Percentage of Expected vs Actual Visits, Home Visits, or alphabetically. The gray bar corresponds to the count of actual home visits, and the black line indicates the calculated expected visits.



Dashboard 4: Trends

The Trends dashboard shows the expected vs actual home visits over the selected date range, displayed by week, month, quarter, or year – as indicated by the 'Aggregate results by' menu. This dashboard allows you to select a target 'reference percentage,' so if an organization has a target percentage of actual vs expected visits of 75%, for example, the report will provide that line in the graph to compare with each interval's percentage of actual vs expected visits. This dashboard defaults to showing this data for the entire organization, but you can filter to show the data for a particular home visitor or primary caregiver, if desired.

