



Introduction

There are many ways to plan and implement a home visit. Take Root Home Visitation is a comprehensive curriculum that helps you pull together the pieces of your home visit in a meaningful way. This curriculum includes integrated intake, planning, and reporting documents and recommendations for each step of the visit itself.

By the end of Part 3, you will be able to:

- Identify the many elements of your home visit.
- Understand the resources available to you to assist in your intake, planning, and reporting.

While it may feel like there are many pieces to sort out, this section carefully introduces all the elements to a home visit. Part 4 provides a practical example in the form of a *Case Study Family* to show how all the components come together and offers you an opportunity to flex your home visitor insights into possibilities beyond what is presented.

The Flow of a Home Visit

TRHV recommends the following steps for each visit. Using the same general steps each time you plan, implement, and report on a home visit helps define a routine and rhythm for you and the families you visit. As the TRHV content helps families discover and reinforce routines that foster resilience and stability, the familiarity of a visit routine also helps establish rapport and engagement between you and the family. When one of you feels strongly that an exception needs to occur, such as a pressing need for using the time differently (e.g., changing the focus of the planned content or an immediate care need of a family member), you and the parent can quickly identify the change in routine and adjust.

These steps are presented as a basic outline to give you a sense of the flow of a visit. Many of them may be very familiar to you; however, you may not have done them exactly like this or in this order.



Basic Visit Outline

- o Warm Greetings to parent and child.
- o **Check In with Parent** How are you? How have things been going since our last visit?
- Reflection from Last Visit: What one-on-one activity did you decide to try with your child? Suggested prompts:
 - o Tell me about what happened.
 - o How did you introduce the activity? How did it feel to you?
 - o How do you think this activity helped your child learn and grow?
 - o What might you do differently next time for you or for your child?
 - o Is there a tip you would share with another parent about this activity?
- Discuss Plan for Today's Visit
- Everyday Moments: A Conversation
 - o Revisit why we chose this Moment.
 - o What is working well? What would you like to change?
 - o Discuss information from the module and strategies using *Family Pages* and related resources.
- One-on-One Activity: Supporting the Parent-Child Dance
 - o During the visit: Try out a one-on-one activity related to the *Everyday Moment*.
 - o After the visit: Encourage the parent(s) to continue practicing the one-on-one activity or choose another to try.
- Summary of Key Points and Plans for Next Visit
 - o Go over any new concepts, points of interest, and activities or responses the parent may be trying. Restate what topic(s) are noted for the next visit.
- Warm Goodbyes to parent and child.

Take a Moment: Flow of a Home Visit

How does this outline compare to your current practices?

How might any of these steps enrich what you already do?

Even if you follow the guidelines we provide in TRHV and draw on your own experiences as a professional, your home visits will not always feel organized or ideal. That is OK. As you work through the next few pages, you will begin to see how the *Basic Visit Outline* gives structure to planning and reporting. In addition, it allows for flexibility to make adjustments as needed once you step into a family's home and meet the parents and child(ren) where they are that day.



Implementing Take Root Home Visitation: A Step-by-Step Process

This section introduces you to the materials and steps used to implement TRHV. The graphic to the right shows the steps that home visitors can use to implement TRHV:

- Gather information,
- Build a collaborative Family Service Plan,
- Choose specific topics for visits, and
- Integrate an ongoing assessment that gives parents a voice and choices throughout the process.

Also highlighted in the graphic are the appropriate time points for using the measures, planning visits, and reporting.

Data-Informed Decisions

Building a Family Service Plan starts with gathering information. TRHV uses two screeners and initial family conversations as sources of information. These help you make curricular choices and guide your work together:

- 1. The Family Needs Screener (Screener: FNS);
- 2. The Protective Factors Survey, Short Form (15-item PFS:SF); and
- 3. Early conversations with parents about their goals for home visitation and their hopes and dreams for themselves and their child.

These measures are also used to check in with parents at the 6-month point or when closure occurs. This reassessment cycle is explained in Step 5 to the right.

Step 1: Intake Sessions Typically 1-3 Contacts, FNS and PFS-SF Completed, first conversations with parent(s) Step 2: Analysis of Screeners and Follow-Up Visit HV has scored FNS and PFS-SF, score summaries are ready to show parent(s) HV and parent(s) discuss scores and Parent Information Sheet Rapport-building, selection of topics and priorities **Complete Forms: Intake/Update Form AND Parent Information Form** Selection of Everyday Moment Critical Concerns • PFS/FNS Data Indicators Age of Child Topical struggles/interests Step 4c: Step 4a: Documentation and Planning **Lesson Preparation** • Information from Module tailored • Complete post-visit documentation to family • Selection of Family Pages • Note plans for next visit Selection of Resources • Note needs/resources/concerns Selection of Activities **Complete the Reporting Portion: Complete the Planning Portion: Visit Planning & Reporting Form Visit Planning & Reporting Form** Step 4b: Lesson Implementation • Steps of a Home Visit Step 5: Repeat Repeat Assessments at 6 months into Services and every 6 months that follow until closure

TRHV Step-by-Step Process chart.

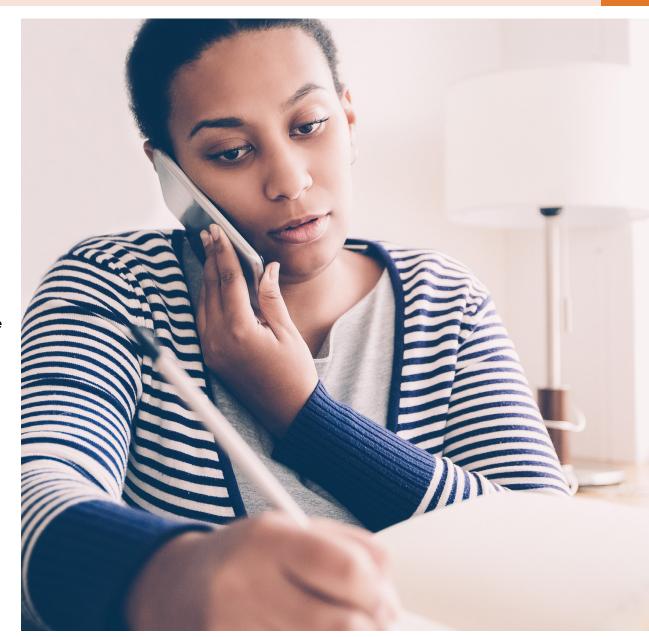


Step 1: Intake Sessions (Assessments and Conversations)

TRHV is designed around current practice within the New Parent Support Program across all branches of the Department of Defense. For instance, the *FNS* is part of the intake information used to help you learn about certain critical needs a parent may disclose and then help you assess whether a family is eligible for home visitation services. As part of your current practice, you likely follow up after reviewing the score on the *FNS* and talk with the parent, perhaps asking him or her to complete additional measures or offering other resources.

In TRHV, the *FNS* is one of two measures used to provide intake information. The second measure is the *PFS:SF*. If your installation does not yet use the *PFS:SF*, full training on this measure is available online and via the TRHV-specific training.

The PFS:SF is linked directly to the Protective Factors Framework and is also a screening instrument. Whereas the FNS identifies several different areas of potential risk or absence of risk, the PFS:SF identifies potential areas of protection (resilience) and absence of protection. The two measures complement one another, which will be shown in Part 4 with the Case Study Family example.





Step 2: Screener Analyses and Follow-Up Visit

Once the *Screener* and the *PFS:SF* are scored, the information provided by these measures can be used to start conversations. Parents can reflect on their answers; home visitors can start modeling strengths-based language to help describe what the scores can indicate.

The third source of information used at intake (and again every 6 months) is the *Parent Information Form*, a short open-ended intake form, shown to the right. It has questions about parents' goals and hopes for themselves and their children and can be completed by the parent alone or with help from a home visitor. This 1-page form helps gather more details about the family background, age of the child who is eligible for services, and if there are any specific topics on which the parent would like to focus.

The questions on the *Parent Information Form* are conversation openers, not prescriptive. The intent is to start the first of many conversations about what a parent may be thinking and feeling while building a connection to someone they can trust. While some of the needs a family has can be beyond the scope of the home visitation program, there may be connections that you can help make or resources that can be shared. If there are needs beyond this secondary prevention program, for example, where intervention is recommended, you and your supervisor may be able to facilitate those warm hand-offs to appropriate programs and professionals.

With these three sources of information, you are ready to draft a Family Service Plan that is informed by data from the two screening measures and by the information shared by the parents. Use the Intake/Update Form for Family Service Plan on the next page to combine the information from the FNS, the PFS:SF, and the Parent Information Form into a single document.

take root home visitation	Parent Infor	rmation Form	
Family ID:	Dat	te:	
Type of Program Planning: Parent Information for the Family Service Plan Date: Initial: 24-Month Review Date: Initial:	6-Month Review Date: Initial: 30-Month Review Date: Initial:	Date: Initial: 36-Month Review Date: Initial:	☐ 18-Month Review Date: Initial: ☐ Closure Date: Initial:
Age of Child for NPSP Services Years:	:	Months:	
Parents' Dreams and Goals for	their Child/Children:		
arents' Dreams and Goals for	NPSP Participation:		
arent's Topics and Areas of In	terest for Conversations:		

TRHV Parent Information Form.



The first page of the *Intake/Update Form* focuses primarily on information from the *FNS* and the *PFS:SF*, as seen on the right.

Notice that it has space to record the family ID, date, and if this is a new intake or a subsequent review and update at the top.

The next section on this page is where you will copy this family's current *FNS* information, including the date it was completed, the scores for each subscale, total number of high-needs qualifiers, and the total needs score.

The third section is where you will record this family's *PFS:SF* scores and the date that measure was completed.

At the bottom of the first page, you are asked to identify this family's reported strengths and risks from the scores on these two measures. This is where you write your first notes, reflecting on what these scores represent to you at this point in your work with the family.

1 take	P roo	t		Intake/Up For Family					
Family ID:					Date:				
Type of Progra	m Plannii	ng: Initia	l Inta	ake into Active Case Ma	anageme	ent		· · · · · · · · · · · · · · · · · · ·	
Parent Info Family Sen Date: 24-Month I Date:	vice Plan Initial:_		_	6-Month Review Date: Initial: 30-Month Review Date: Initial:		Date:	_ Initial:	Da Clo	-Month Review ste:Initial: osure ste:Initial:
Family Needs S		(FNS) sco	ores:						
Date Complete	d					Needs Score			
Demographics					Family	of Origin Viol	ence/ Neglect	:	
Stress					Self-E	steem			
Relationship Di	scord				Depre	ssion			
Support					Prior F	amily Violence	e		
Substance Abu	se				Numb	er of High-Nee	eds Qualifiers		
Violence Appro	val								
Protective Factors	Date C	omplete	d	Family Functioning/ Resiliency	Social	Support	Concrete Su	ıpport	Nurturing and Attachment
Survey (PFS) Scores:									
From the inform	nation ab	ove, iden	itify 1	this family's reported ST	RENGTH	HS and ABSEN	ICE OF RISK:		
1. FNS Areas w Low Identified I maybe 1):	ith Absen	ce or		Demographics □ Stress Violence Approval □ Viol	☐ Relati	onship Discord	□ Support □		
2. PFS Areas wi Protection (scor	-			Family Functioning/Resilien	cy 🗖 Sc	ocial Support 🛚 🗖	Concrete Supp	oort 🗆 N	urturing and Attachment
From the inforr	nation ab	ove, iden	itify 1	this family's reported RIS	SKS and	POTENTIAL F	OR INCREASE	ED RESILII	ENCE:
1. FNS Areas wi (scores of 1 or Hig				Demographics					
2. PFS Areas with Levels of Protecti			_	Family Functioning/Resilien	cy 🗖 Sc	ocial Support 🛭	☐ Concrete Supp	port 🗆 N	urturing and Attachment

TRHV Intake/Update Form for Family Service Plan, Page 1.



The second page of the *Intake/Update Form* focuses on connecting the strengths and risks from page 1 to the five *Protective Factors*.

If this is the beginning of work with this family, you may not have a lot to write. Yet, you may still have early ideas of what could be helpful and what strengths you could start with to engage and build a strong parent-home visitor relationship. Examples are given on the form to help generate your own thoughts about a family.



Intake/Update Form For Family Service Plan

	Strengths	Challenges
	FNS or PFS scores suggest parent(s)	FNS or PFS scores suggest parent(s)
	(e.g.,has people she can count on for help and to talk to.)	(e.g., currently does not feel she has anyone who supports her or could help if needed.)
Social Connections		
Concrete Supports of Families	(e.g., is able to meet the family's basic needs and knows community resources for help.)	(e.g.,currently does not feel able to meet the family's basic needs or does not know community resources for help.)
Parental Resilience	(e.g.,intimate relationship is supportive and they are able to problem solve in healthy ways where there are conflicts.)	(e.g.,intimate relationship currently is not supportive or they ar not able to resolve conflicts in healthy ways.)
Knowledge of Parenting and Child Development	(e.g.,has knowledge of positive parenting practices or understanding of their young child's needs and abilities.)	(e.g.,needs support to gain knowledge of positive parenting practices or understanding of their young child's needs and abilities.
	(e.g.,has understanding of how his actions as a parent can	(e.g.,needs support to gain understanding of how his actions a
Social and Emotional Competence of Children	promote his child's social and emotional skills.)	a parent can promote his child's social and emotional skills.)
Notes:		

TRHV Intake/Update Form for Family Service Plan, Page 2.



Step 3: Selection of Everyday Moment or Special Focus Moment

The TRHV curriculum offers 11 different *Moments* that you can use in your home visit. These *Moments* are grouped topically and are appropriate for children from birth to 3 years old, first-time or experienced parents, and those with or without experience of military family life contexts. The three main groups of *Everyday Moments* were described in depth in Part 2 and are highlighted here:

- 1. Daily Care and Living Routines;
- 2. Young Children's Play and Exploration, fostering parental perspective-taking of children's experiences in their growth and development; and
- 3. Parenting Life, how to build positive parenting and co-parenting skills and practice self-care.

The additional *Special Focus Moments* concentrate on two experiences that have wide-ranging impacts on family and individual health and resilience in our military family population:

- 1. Parental Absence in Military Life; and
- 2. Parenting After Injury.

The current research on these *Special Focus Moments* is not yet reflected in most commonly available parent education curricula. TRHV starts that process.

It is worth highlighting that each *Moments* chapter goes into greater detail than is needed for a single home visit, and a particular chapter may be used across multiple home visits, depending on the needs and priorities of the family. The chapters are purposefully wide-ranging to adequately address important and interesting age-related differences of infants and toddlers and to attend to the knowledge gaps of parents. In addition, there is particular focus on issues of safety and supervision throughout the chapters to better meet needs of parents who may be limited in their current safety knowledge, skills, and abilities.



The TRHV curriculum is based on the idea that home visitors should let the scores on the FNS, PFS:SF, and the discussion with the parent guide which topics are higher priority. How is this done? The Intake/Update Form for Family Service Plan collected information from these three sources.

As you complete and review this form, ask yourself, "What does that information tell me?" Reflect on the information you've learned about a family, and, then, check the list of *Everyday and Special Focus Moments* to see which one(s) best match a family's introductory profile.



Take a Moment: Meeting a New Family

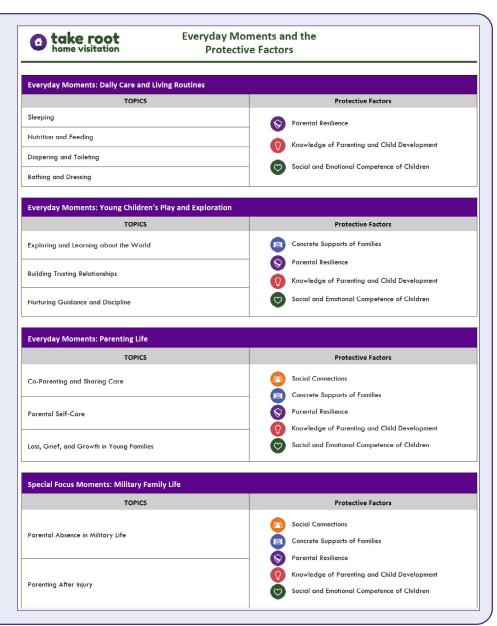
You meet a family who are first-time parents with a 3-month-old daughter who shows signs of colic. The inconsolable crying is wearing on the parents' sense of their ability to care for their child. They find the colic cry pattern very disruptive in their daily lives.

When you review the scores of the *FNS* and *PFS:SF*, you find that this family's social support is very low, and there is a history of family violence in the mother's family of origin. You've also learned through your first conversations that both parents are only children and have very limited experience with infants and toddlers.

These items hang together in a meaningful way as you assess what topics might be most important at the beginning and what topics could be challenging to address early in a home visitor-family dyad. These items can also give insight into a topic that provides a pathway to address multiple concerns between your assessment and the family's stated needs.

Just from the description of the family above, what might you want to focus on first? Second?

How might you find a way to wrap more difficult conversations into a context that is easier to start with and build trust and rapport?





Steps 4a-b: Lesson Preparation and Implementation

The Visit Planning & Reporting Form should be used to prepare for each visit. This form helps you complete the process of choosing a topic and the particular pieces of information you want to bring into conversation at the visit. The form also guides you as you collect the appropriate resource materials, including Family Pages, to bring to the visit. It provides space to record parents' thoughts and contributions during the visit, making visible the partnership that is growing between you and the families in your caseload.



The Visit Planning & Reporting Form models the steps of a home visit we outlined earlier. While it is not mandatory to do these steps in this order, each of the elements serve to create opportunities for conversations, build trust and rapport, and engage with families who come from a spectrum of positive and negative experiences with outside personnel in family and child services.

Using the *Visit Planning & Reporting Form*, you are able to quickly identify the *Moment* you want to share with the family. Each *Moment* chapter is your one-stop-shop. In each chapter you will find the following:

- Background content for you, including research, common concerns of parents, and *Boots on the Ground* strategies to share with families;
- Family Pages;
- Suggested parent-child activities; and
- Recommended links to national and community resources.

The Visit Planning & Reporting Form gives you the opportunity to make sure the parent's voice is heard and acknowledged in the space labeled "What a parent wants to share with or show to me." For example, a parent may have shown you what safe sleep recommendations have been completed since the last visit or disclosed some family history that they are only now comfortable sharing.



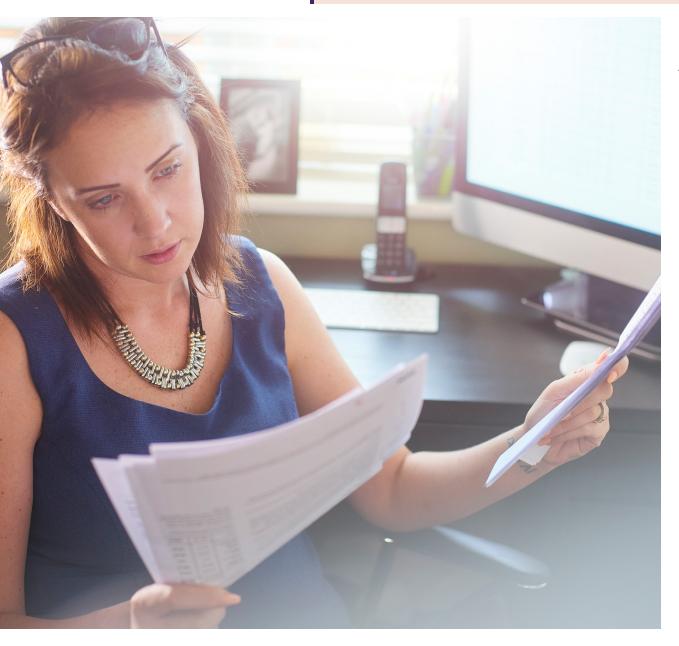
Family ID:	Visit D	ate Scheduled:		Completed Yes No
	Visit D	ate Completed (If	Different):	10 100 100
Protective Factors Focus During Visit	:	Planned		Addressed
Social Connections		☐ Yes	☐ No	Yes No
Concrete Supports		☐ Yes	☐ No	☐ Yes ☐ No
Social and Emotional Competence of	Children	☐ Yes	□ No	Yes No
Parental Resilience		☐ Yes	☐ No	Yes No
Knowledge of Parenting and/or Child	Development	Yes	□ No	Yes No
Everyday Moment Topic and Touchir	g Base (from Last Visit):			
Planned (e.g. Safe Sleep/Sleep Routines) a)				Completed Yes No
b)				Yes No
				☐ les ☐ MO
c)				Yes No
c)				Completed
c) Actual, if different: Handouts/Resources/Family Pages:				Completed Yes No Yes No
c) Actual, if different: Handouts/Resources/Family Pages: Planned (e.g. Resource/Safety Sheets, Famil	y Pages)			Completed No
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c) Actual, if different: Handouts/Resources/Family Pages: Planned (e.g. Resource/Safety Sheets, Famil a) b) c)	y Pages)			Yes
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Actual, if different: Handouts/Resources/Family Pages: Planned (e.g. Resource/Safety Sheets, Famil a) b) c) Actual, if different: Any additional time spent on an item? Parent Shares and/or Shows:	Please explain. Planned Parent/Ch	ild Activity:		Completed
c) Actual, if different: Handouts/Resources/Family Pages: Planned (e.g. Resource/Safety Sheets, Famil a) b) c) Actual, if different: Any additional time spent on an item?	Please explain.	ild Activity:		Completed
c) Actual, if different: Handouts/Resources/Family Pages: Planned (e.g. Resource/Safety Sheets, Famil a) b) c) Actual, if different: Any additional time spent on an item?	Please explain. Planned Parent/Ch	ild Activity:		Completed

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TRHV Visit Planning & Reporting Form, Page 1.

TRHV Visit Planning & Reporting Form, Page 2.





Step 4c: Post-Visit Documentation and Planning

The Visit Planning & Reporting Form also helps you reflect on what actually happened during a visit and start preparing for next steps and the next visit. Developed to work as part of an evaluation of both the TRHV curriculum and a program's implementation of the curriculum, this form is not intended to replace current visit documentation. Consult with your supervisor to see what documentation is still needed for your program.

Post-visit documentation is important for several reasons:

- Track progress and change over time;
- Reflect on elements of resilience and strength seen in the parent/family/child;
- Identify points of concern and improvement;
- Identify potential needs for referrals to other programs and professionals; and
- Document if what is planned for the visit is close to or different from what occurs during the visit.



Post-visit documentation is a good way for you to identify patterns when working with families. This type of documentation can help you and your program assess whether the current approach and interventions are appropriate for the family.

Two short checklists at the end of the *Visit Planning & Reporting Form* help you determine if there are particular action items that need to be completed after a visit:

- The first 4-item checklist identifies items outside the scope of providing prevention support—items that need to be brought to the attention of one's supervisor, other program contacts, or a crisis management contact. These are considered external to most home visitation programs; the majority of home visitation programs are prevention-focused and non-clinical, yet families participating in a home visitation program may also need clinical or other interventional support.
- The second 4-item checklist highlights particular follow-up actions, such as a call, earlier return visit, or a need to find certain resources for the next visit.

External to HV Visit Planning: Completed: Date Completed: Complete
Follow-up with supervisor/colleague No N/A Start a mandated reporting query No N/A Plan next visit sooner No N/A Plan next visit sooner No N/A Make a referral Yes Gather resources to share No N/A Select curriculum for next visit to start addressing issue No N/A Other: Yes Other: Yes Other: Yes Other: Yes
Start a mandated reporting query No
Make a referral □ No
Engage crisis management team Select curriculum for next visit to start addressing issue No N/A Other: Yes Other: Yes
L Yes

TRHV Visit Planning & Reporting Form, Page 3.



Home Visitation Visit Cycle and Periodic Updates of Information

Once a home visitation plan is established with a family, the *Visit Planning & Reporting Form* is used to prepare for and report on each visit. Every 6 months a parent is in the home visitation program, TRHV strongly recommends that a reassessment be completed.

This means having parents fill out the FNS and the PFS:SF and reflect on the Parent Information Form to determine where they currently are in their goals and dreams for themselves and their child. While it is not standard practice across all Military Services to use the FNS as a repeat measure, it is standard practice in at least one Service.

The *PFS:SF* is designed as a pre-post measure. These measures can be used at 6-month intervals or, if a family closes participation, as closure measures.





In Summary

TRHV recommends certain actions for home visitors to engage with parents and build strong home visitor-parent alliances. There are four integrated forms that support the home visitor in making the most of the TRHV curriculum, and they define the planning, preparation, implementation, and reporting cycle: the Intake/Update Form, the Parent Information Form, and the Visit Planning & Reporting Form. Information on each form provides guidance to the home visitor while allowing the curriculum to be tailored to each family receiving services.

In the next section of this manual, a practical example demonstrates how to pull the information gathered through the FNS, PFS, and Parent Information Form into a meaningful assessment-preparation-reporting loop for the first visit with a planned topic. TRHV is designed to give you, the home visitor, an array of strong options for selecting Moments that attend to the strengths and needs of each family while creating conversations that build trust, engagement, and knowledge.

