

Regional T/TA Network

Health Component: Tracking, Reporting and On-going Monitoring



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Learning Objectives

- Health manager's role in tracking and recordkeeping
- Explore ways to foster tracking and recordkeeping skills
- Identify available resources to support staff in recordkeeping and tracking





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Learning Objectives

- Understand the role Health managers play in supporting the effective use of health data
- Get to know the four data activities
- Learn the difference between compliance and performance
- Learn how to use data in planning and decisionmaking



Tracking and Recordkeeping



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• A program must develop a system to track referrals and services provided and monitor the implementation of a follow-up plan to meet any treatment needs associated with a health, oral health, social and emotional, or developmental problem.

App	licati	ion Pool	٤.		Dashboard Inta	ke Demograph	ics Disab	ility Service	Health	Child/Adult	t Develops	nent Fam	ily Development	Services My Case Notes WIA Group Events F		
Add Q. Filter:On				Application Form Enrollment Package Program Status												
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	789	Bob White	3/3/2012		FID: 205 Application Date: 7/20/2011 Moo, Kathy [Early Head Start] HOH: Liu, Mom PID: 650 Viewing: Kathy, Mao (F.& Minths) + DOB: 7/20/2011 () Hot Report Currently: 1st Year Enrollment from 09/13/2011 in Richmond Family Service Badger Center Bonnie											
	693	BUZZ LIGHTYEAR	9/5/2007	1.02	Currently: 11: Year Enrollment from 09/13/2011 in Hochmond Family Service badger Letter Bonnie Schedule -: CDC Schedule 2011 (Certain High Risk Groups)> Current Schedule Status: Past Due											
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	646	Jack Apple	1/8/2011		Hep 8	A (Current)		9/19/2011					4/13/2012	Current (2/3)		
	709	JC Wenatchee	4/6/2008		Hib	E (Current)	0/1/2011	9/19/2011					10/20/2012	Current (0/1)		
	24	John Doe	5/10/2002		Influenza	A (Current)							4/13/2012	Current (0/6)		
	691	John Yoko Lennon	9/5/2008		Meningococcal								7/20/2013	Current (0/6)		
	726	Jolene Conat	4/12/2010		Meningococcal	A (Current)							7/20/2013	Current (0/1)		
	650	Kathy Noo	7/20/2011			A (Current) A (Past Due)							9/20/2012	Past Due (0/5)		
•					Pneumococcal									the same bar and the same same same same		
D/33 record(s) selected					Polio	A (Past Due)							9/20/2011	Past Due (0/4)		
My Family Group					Rotavirus	A (Past Due)							9/20/2011	Past Due (0/3)		

Neither the Office of Head Start nor the National Center on Early Childhood Health and Wellness endorse any one particular Management Information System or tool





Tracking Systems Used in HS and EHS







What comes to mind when you think of health tracking and recordkeeping?





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Health Data



Health Manager's Role

- 1. What's involved in this role?
- 2. What challenges might you face?





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Using Data: Health Manager's Role

- Gather and use health data
- Understand the health status of children
- Use data to tell a compelling story
- Present data in a way that promotes strategic decision-making
- Report appropriately internally and externally



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What are the sources of health & safety data that are tracked and recorded?

- Well child visits (EPSDT)
- Oral health visits
- Follow up visits for identified issues
- Individual child health or service plans
- Nutrition related information
- Developmental screenings
- Ongoing assessments
- Child & family demographics

- Daily Health Checks
- Family partnership agreements
- Family referrals to community resources
- Program self-assessment information
- Injury reports
- Safety checks
- Pregnant mother visits



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Group Activity:

Tracking Data on Health and Safety

- What are some strategies and best practices for health tracking and recordkeeping?
- What tools do you use?
- Who do you work with?
- What are some success stories?
- What are some challenges?



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Useful Data

In order to be useful, data must be presented to decision-makers in such a way that they can relate to the data and act upon the information.











Prepare







Collect









Aggregate and Analyze

What do I want to know?

- a) How many children were enrolled last month?
- b) How many of those were screened?
- c) How many children left the program?
- d) How many children do I currently have enrolled?
- e) How many of those are screened?





Aggregate and Analyze

What do I want to know?

- a) How many children needed referrals?
- b) Referrals for what?
- c) How many received treatment?
- d) How many are still needing treatment?Of these, what are the reasons for not completing their treatments?



Aggregate and Analyze

What do I want to know?

a) What can I do differently to improve these numbers?

- b) What would I need?
- c) Who should I inform of this?
- d) Who could help me with this?





Use and Share





Moving with Tradition



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Reporting



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You are a Manager





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Managing to Achieve Results





Compliance vs Performance

Compliance We followed all the rules

Performance



Look at what we accomplished!



Ongoing Monitoring





On-going monitoring





Elements of an Effective Ongoing Monitoring System





Elements of an Effective Ongoing Monitoring System







Elements of an Effective Ongoing Monitoring System





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Elements of an Effective Ongoing Monitoring System







Elements of an Effective Ongoing Monitoring System







Elements of an Effective Ongoing Monitoring System





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On-going monitoring

What d data she working

Why do well?

		-		
Lead with strengths	Identify the challenges	Analyze data through dialogue	Make course correction	Check-in & follow up
/hat does the ata show is orking well? /hy does it work ell?	What's not working well? Why is it not working well?	What aspects of "what is working" can be used to find a solution?What factors have been considered in reaching a solution?What else do we need to know before we decide?	 What changes do we propose? Will the changes help us comply with regulations? Do the changes advance our goals? Who is responsible for implementing? 	What data will we need to review and how often? How will we make sure the changes are working? Is it a short-term or long-term solution?



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Program Planning Cycle





Linking Planning, OGM, and SA

Program Planning



Decide on goals

- •Review and analyze Community Assessment & other relevant data
- Review recommendations from SA report
- Develop long-term program goals **Develop objectives**
- •Set short-term program & fiscal objectives

Develop plan of action (work plan)

- Develop action steps for objectives
- Identify measures to monitor (prepare for data collection)
- Plan for regular progress reports to staff, GB and PC
- Develop service plans assuring they reflect new goals/objectives

Ongoing Monitoring

Collect:

•Collect data (PIR, child outcomes data, results of OGM for all systems, services, goals & objectives.)

Analyze:

• Review & analyze data with managers

Act:

- Make course corrections
- Determine new data measures **Ensure**:
- •Evaluate & follow up on course corrections
- •Verify accuracy of and summarize OGM data for review by SA team
- •Request SA team to analyze persistent systems issues

Self-Assessment

Prepare:

- Design Self-Assessment process
- •Orient & train Self-Assessment participants

Analyze:

- •Analyze information presented (OGM summaries, OHS monitoring results, other info needed)
- •Determine and request if further info is needed

Recommend:

•Identify strengths and make recommendations for improvement & enhancement





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