



# Implementation Guide



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# Hello Baby Cheat Sheet

## Step 1: Receive referral in Synergy

Review the referral, taking note of best contact info, family needs, and other information provided by the Outreach Worker in the Contact Notes section.

Refer to [pg. 18](#) for additional support

The family should stay in *Pending* until:


- Family wants to continue receiving information from the center --> Move to *Drop In*
- Family wants to participate in services regularly (i.e. monthly diaper bank, weekly parent-child interaction, home-visiting, etc.) --> Move to *Enrolled*
- Family does not want to be contacted by the center anymore --> Move to *Not Interested*

## Step 2: Contact the Family

- First attempt should occur within 48 hours of receiving the referral.
- Make at least 3 attempts to contact the family on the phone number identified as successful by the Outreach Worker.
- Document all contacts (attempted AND successful) in Synergy as contact notes

Refer to [pg. 3](#) for timeline questions.

Refer to [pgs. 5-8](#) for talking points.

**Referrals with  logo** – Refer to [pg. 15](#) if family has questions about how you received their info.

## Step 3: Deliver Welcome Bag (within 7 days of contact)

- Record one Group Event for all deliveries throughout the week
- If no contact is made within 3 attempts, a Welcome Bag should be delivered to the most reliable address, then mark the referral "Not Interested" with the current date.

Refer to [pg. 8](#) for scheduling guidance.

Refer [pg. 27](#) for recording the Group Event bag delivery in Synergy.

## Step 4: Complete any necessary referrals for the family

- For nurse referrals to the Health Department, use this link: <https://www.alleghenycounty.us/Health-Department/Health-Services/Maternal-and-Child-Health-Services/Enrollment-Form.aspx>. There is a place to select "Family Center" as the referring agency.

For referrals to other partners, including the Pittsburgh Study, see [pg. 33](#).

To document referrals in Synergy, see [pg. 30](#).

## Step 5: Follow up contact (2 weeks after referral)

- Update family's status if needed and complete [Family Interest Survey](#)

Refer to [pg. 3](#) for timeline guidance.

Refer to [pgs. 6-7](#) for more talking points.

## Checklist

- ☐ Did they receive a Hello Baby Welcome Bag?
- ☐ Did the family want to drop in or enroll in the center?
- ☐ Do they know where to go to have their basic needs met?
- ☐ Did I connect the family to:
  - A nurse? (either in-house or through Allegheny County Health Department)
  - Specialized supports? (PAT, Family Checkup, Early Headstart, Early Intervention, breastfeeding support)
  - The Pittsburgh Study?

## Timeline

### After birth

A social worker from the hospital will fill out a survey based on needs identified by the hospital staff. After submission, the family's information will be sent to the Centralized Outreach Team.

### After birth

The Centralized Outreach Team will refer families to their nearest Family Center and help them enroll in services such as First Year Cheer. FC Site Directors will receive notification of a referral in Synergy.

### 1-2 days after referral

Site Directors can use child's birthdate and critical tags to help determine if this is a Hello Baby referral. **SDs will assign this case to a staff member to follow up with outreach. The staff member should review any contact notes from the Outreach Team prior to contacting the family.**

### 1-2 days after referral

**Staff member calls family.** Refer to the [Conversation Guide](#) for talking points and resources.

### 1-7 days after contact

**Welcome Bag and/or First Year Cheer items are picked up at the Center or delivered by staff.** During initial outreach, staff will schedule a pick-up/delivery time with the family. Delivery should be completed within 7 days of initial contact. **Ensure that the Welcome Bag Letter is filled out prior to pick up/delivery.**

### 1-14 days after contact

**Enter all contacts and bag delivery in Synergy.** Contact any referrals (i.e. nurses, external partners) and enroll family in Center if they wish). See [Synergy Guidance](#) for details.

### 2 weeks after first contact and beyond

**Staff member will call to check in and begin ongoing engagement with the family.** Continue to offer diapers and submit First Year Cheer requests over the course of the year.

**\*Take Note\***

- Make contact with all referrals within 48 hours.
- Deliver a Welcome Bag to all Hello Baby referrals.
- Build a relationship with the family that leads to enrollment and ongoing access to resources.

**\*What if I can't get in touch with the family?\***

- Make at least two more attempts over the next 48 hours. Leave texts, messages, or emails when possible.
- Deliver a Welcome Bag with a copy of the [Welcome Bag Letter](#) and the [Family Interest Survey](#).



# Conversation Guide

### When contacting a HELLO BABY referral:

Hi, I'm (name) with the (location) Family Center. I got your number from the Hello Baby Outreach Team (state name of outreach worker if known). Congratulations on your new baby! Now that you've been home from the hospital for a while longer, I wanted to check in and see how things are going. Do you mind if I ask you a few questions about how you and your baby are adjusting?

Use the following **Talking Points** and have a conversation to better understand the family's tangible & emotional needs. Use your professional judgement to provide tangible aid, information and connection to resources, stress-management tips, and short-term emotional support. Use the [Quick Reference Guide for Hello Baby Supports](#) on page 7, or **APPENDIX A** to provide tangible support.

### Hello Baby Talking Points/Conversation Starters:

- *Is this your first baby?*
- *Do you have other children at home?*
- *How was your delivery?*
- *How have you been feeling? Do you have any concerns about your recovery?*
- *How is your baby? Do you have any concerns about their health?*
- *Are there any items you need right now for your baby? How about for you or the rest of your family?*

After briefly talking with the family, inform them about available supports and services (i.e., First Year Cheer, the Diaper Bank, parenting classes, home visiting, etc.).

Our Family Center offers a variety of programs and services that can help make this phase of life a little easier! Let me tell you a little bit about a few things we can offer you right now!

<b>First Year Cheer</b>	Through First Year Cheer, you can get up to 4 packages of free baby items like formula, hygiene products, clothes, and books throughout your baby's first year of life. Would you like me to help place your first order?
<b>Diapers</b>	Our Family Center is a Diaper Bank partner. We can give you 50 diapers and wipes up to 6 times per year. Would

	<i>you like me to add in a set with your First Year Cheer items? What size would you like?</i>
<b>Infant Formula Bank</b>	<i>The Greater Pittsburgh Infant Formula Bank has locations across the County and can provide your family with up to 12 cans of formula per year. Would you like me to help you find the closest location to your home?</i>
<b>Programs</b>	<i>Our Center offers services like infant play groups, parenting classes, and home visiting programs (<u>insert programs that are applicable to your Center</u>). Would you be interested in hearing more about any of these programs?</i>

Depending on the family's interests, utilize the scripts below to coordinate item pickup, services, etc.

#### **Interested**

*Great! Your First Year Cheer items will be delivered to the Family Center on (date). Once they're delivered, I'd love for you to come to the Center so I could give you those items, a set of diapers and wipes, a Newborn Welcome Bag that is full of other baby items, and show you around the Center! Is there a good day/time for you to come pick these items up and see the Center?*

#### **Not Interested**

*That's okay! If you are interested in the future, you can reach out and we would be happy to connect with you our programs at that time! In the meantime, I do have a Newborn Welcome Bag for you here at the Family Center. This bag has baby items like diapers and a sleep sack in it. Are you able to come to the Center and pick this bag up?*

Depending on the family's ability to come to the Family Center, utilize the scripts below to coordinate item pickup or drop off.

#### **Family is ABLE to come to the Center**

- Set up a time to meet the family at the Center
- You can offer to show the family around the Center again when they come to pick up the items.
- Provide the family with program fliers/handouts to remind them of the available programs.

#### **Family is UNABLE to come to the Center**

- Offer to deliver the items
- Ask if there is a good date/time for delivery
- Mention that you'd love to connect with the family at the time of delivery, but that you understand having a newborn is difficult and this may not be possible.
- If the family does not want to meet in-person or is unavailable when you arrive, ask if leaving the items on the porch is okay or if an alternate drop-off location is better.

### Other Topics to Discuss during Follow-Up Conversations:

- *Having a newborn is hard, especially at a time like this. How have you been managing with everything going on?*
- *Do you have your next postpartum/baby's next wellness visit scheduled? Do you need help scheduling or getting to your appointments?*
- *How is your baby eating?*
- *Are you breastfeeding? How is that going?*
- *How is your baby sleeping? Where do they sleep?*
- *Do you have a separate sleeping space for the baby? Do you need a crib?*

### Quick Reference Guide for Hello Baby supports:

- [Maternal & Child Health Services](#) (412-247-7950)
- [Healthy Start](#) (412.247.4009)
- [Healthy Start Center for Urban Breastfeeding](#) (412.545.2022)
- Healthy Start LATCH line for Black mothers (412.545.2022 option 1)
- [Breastfeeding Center of Pittsburgh](#) (412.246.4726)
- [WIC](#) (412.350.7240)
- [Greater Pittsburgh Food Bank](#) (412.460.3663 x655)
- [Early Learning Resource Center](#) (412.350.3577)
- [Western PA Diaper Bank](#) (412.373.3074)
- [Mid-Atlantic Mother's Milk Bank](#) (412.281.4400)
- [Pittsburgh Brown Mamas](#) (social network and general resources) [brownmamas.com](http://brownmamas.com)
- [Nurture PA](#) (child development & parenting text mentor) [nurturepa.org](http://nurturepa.org)
- Hello Baby website (live chat support) – [helloworldpgh.org](http://helloworldpgh.org)
- [2-1-1](#) (general resources and referrals)



## Resources

	Family Center Offerings & Referrals	Related Information & Additional Referrals
<b>Basic Needs</b>		
Food	<i>(Provide family with local information on food bank/412 Food Rescue distribution)</i>	<ul style="list-style-type: none"> <li>• Food Bank Concierge (412-460-3663, x655)</li> <li>• 2-1-1</li> <li>• Pittsburgh area food map: <a href="https://rebrand.ly/foodmap">https://rebrand.ly/foodmap</a></li> </ul>
Housing	<ul style="list-style-type: none"> <li>• Valerie Strosser, Housing Specialist (412-313-8095, <a href="mailto:valerie.strosser@alleghenycounty.us">valerie.strosser@alleghenycounty.us</a>)</li> <li>• Allegheny Link (1-866-730-2368)</li> <li>• 2-1-1</li> </ul>	<ul style="list-style-type: none"> <li>• Tenant, Landlord, and Homeowner resources: <a href="https://sites.google.com/view/pgghousingcovid19/home">https://sites.google.com/view/pgghousingcovid19/home</a></li> </ul>
Diapers/Formula	<i>(provide family with local information on Diaper Bank/Beverly's Birthdays distribution)</i>	<ul style="list-style-type: none"> <li>• Western PA Diaper Bank (412-373-3074)</li> <li>• Mid-Atlantic Mother's Milk Bank (412-281-4400)</li> <li>• Beverly's Birthdays (412-720-9737)</li> </ul>
Utilities	<i>(provide family with any site-specific utility assistance programs)</i>	<ul style="list-style-type: none"> <li>• 2-1-1</li> <li>• Tenant resources: <a href="https://sites.google.com/view/pgghousingcovid19/tenant-resources">https://sites.google.com/view/pgghousingcovid19/tenant-resources</a></li> </ul>
Baby items (other than diapers/formula)	<i>(provide family with local information on First Year Cheer/Beverly's Birthdays)</i>	<ul style="list-style-type: none"> <li>• Beverly's Birthdays (724-590-5106) or (412-720-9737)</li> <li>• Can also text FIRSTYEARCHIEER to (844-511-1544)</li> </ul>
<b>Benefits enrollment</b>		
SNAP	<ul style="list-style-type: none"> <li>• Food Bank (call 1-833-822-SNAP (7627) or text SNAPPA to 555-88) <a href="http://www.compass.state.pa.us">www.compass.state.pa.us</a></li> <li>• Just Harvest (412) 431-8960 x602 <a href="https://www.justharvest.org/get-help/snap-food-stamps/">https://www.justharvest.org/get-help/snap-food-stamps/</a></li> </ul>	<ul style="list-style-type: none"> <li>• SNAP Referral Form: <a href="https://www.pittsburghfoodbank.org/what-we-do/resources-to-people/snap/">https://www.pittsburghfoodbank.org/what-we-do/resources-to-people/snap/</a></li> </ul>
WIC	<ul style="list-style-type: none"> <li>• <a href="https://www.alleghenycounty.us/Health-Department/Health-Services/Women-Infants-and-Children/Women-Infants-and-Children-Program.aspx">https://www.alleghenycounty.us/Health-Department/Health-Services/Women-Infants-and-Children/Women-Infants-and-Children-Program.aspx</a></li> <li>• For appointments call 412-350-7240</li> </ul>	<ul style="list-style-type: none"> <li>• WIC application: <a href="https://www.pawic.com/OnlineApplication.aspx">https://www.pawic.com/OnlineApplication.aspx</a></li> </ul>

TANF	<ul style="list-style-type: none"> <li>County Assistance Office <a href="https://www.compass.state.pa.us/compass.web/Public/CMPHome">https://www.compass.state.pa.us/compass.web/Public/CMPHome</a></li> </ul>	<ul style="list-style-type: none"> <li>County CAO locations: <a href="https://alleghenycounty.us/Human-Services/Programs-Services/Basic-Needs/County-Assistance-Offices.aspx">https://alleghenycounty.us/Human-Services/Programs-Services/Basic-Needs/County-Assistance-Offices.aspx</a></li> </ul>
Childcare subsidy	<ul style="list-style-type: none"> <li>Early Learning Resource Center (1.888.340.3572 or 412.350.3577) Email: <a href="mailto:elrc5@alleghenycounty.us">elrc5@alleghenycounty.us</a> Website: <a href="https://elrc5.alleghenycounty.us/">https://elrc5.alleghenycounty.us/</a></li> </ul>	<ul style="list-style-type: none"> <li>Application: <a href="http://www.compass.state.pa.us">www.compass.state.pa.us</a></li> </ul>
Unemployment	<ul style="list-style-type: none"> <li>Unemployment benefits <a href="https://www.uc.pa.gov/Pages/default.aspx">https://www.uc.pa.gov/Pages/default.aspx</a></li> </ul>	<ul style="list-style-type: none"> <li>Emergency cash assistance during COVID <a href="https://www.compass.state.pa.us/COMPASS.Web/AFS/EmergencyCashAssistance?fbclid=IwAR1o5dsPpx2C4QZaX-ean59NUtER4_4w512r7CxhiujJPFQ4NvTE6Z_HXsM">https://www.compass.state.pa.us/COMPASS.Web/AFS/EmergencyCashAssistance?fbclid=IwAR1o5dsPpx2C4QZaX-ean59NUtER4_4w512r7CxhiujJPFQ4NvTE6Z_HXsM</a></li> </ul>
Health Insurance	<ul style="list-style-type: none"> <li>CHIP: <a href="http://chipcoverspakids.com">chipcoverspakids.com</a></li> <li>Medical Assistance (Medicaid): <a href="http://compass.state.pa.us">compass.state.pa.us</a> , 1-866-550-4355</li> </ul>	<ul style="list-style-type: none"> <li>2-1-1</li> <li>Health Insurance Marketplace: <a href="https://www.healthcare.gov/">https://www.healthcare.gov/</a></li> </ul>
<b>Pregnancy &amp; Newborn</b>		
Prenatal and Postpartum	<ul style="list-style-type: none"> <li>Healthy Start: <a href="http://healthystartpittsburgh.org">healthystartpittsburgh.org</a> or (412) 247-4009</li> <li>Maternal &amp; Child Health Services: (412-247-7950) (<a href="https://www.alleghenycounty.us/Health-Department/Health-Services/Maternal-and-Child-Health-Services/Enrollment-Form.aspx">https://www.alleghenycounty.us/Health-Department/Health-Services/Maternal-and-Child-Health-Services/Enrollment-Form.aspx</a>)</li> </ul>	<ul style="list-style-type: none"> <li>Hello Baby: <a href="https://hellobabypgh.org/">https://hellobabypgh.org/</a></li> <li>2-1-1</li> <li>DHS Pregnancy to 2 Years: <a href="https://alleghenycounty.us/Human-Services/Programs-Services/Basic-Needs/Parent-Caregiver-Support/Pregnancy-to-Two-Years.aspx">https://alleghenycounty.us/Human-Services/Programs-Services/Basic-Needs/Parent-Caregiver-Support/Pregnancy-to-Two-Years.aspx</a></li> </ul>
Breastfeeding	<ul style="list-style-type: none"> <li>Healthy Start Center for Urban Breastfeeding: <a href="https://healthystartpittsburgh.org/center-for-urban-breastfeeding/">https://healthystartpittsburgh.org/center-for-urban-breastfeeding/</a></li> <li>Breastfeeding Center of Pittsburgh: <a href="http://breastfeedingcenterofpittsburgh.com/">http://breastfeedingcenterofpittsburgh.com/</a> or 412-246-4726</li> <li>La Leche League – 412-276-5630</li> </ul>	<ul style="list-style-type: none"> <li>Healthy Start LATCH line for Black mothers: 412-545-2022 option 1</li> <li>Black Breastfeeding Mama's Circle (Facebook Group) <a href="http://www.facebook.com/blackbreastfeedingmamacircle">www.facebook.com/blackbreastfeedingmamacircle</a></li> </ul>
Social/Support Groups	<ul style="list-style-type: none"> <li>Pittsburgh Brown Mamas – <a href="http://www.brownmamas.com">http://www.brownmamas.com</a></li> <li>Nurture PA – <a href="http://www.nurturepa.org">http://www.nurturepa.org</a></li> </ul>	

	<ul style="list-style-type: none"> <li>Hello Baby website – <a href="http://www.hellobabypgh.org">http://www.hellobabypgh.org</a></li> </ul>	
<b>Child Care &amp; Education</b>		
Early Learning Resource Center	<ul style="list-style-type: none"> <li>Early Learning Resource Center (1.888.340.3572 or 412.350.3577) Email: <a href="mailto:elrc5@alleghenycounty.us">elrc5@alleghenycounty.us</a> Website: <a href="https://elrc5.alleghenycounty.us/">https://elrc5.alleghenycounty.us/</a></li> </ul>	<ul style="list-style-type: none"> <li><a href="https://compass.state.pa.us">Compass.state.pa.us</a></li> </ul>
Head Start and Early Head Start	<ul style="list-style-type: none"> <li>(412) 394-4594 <i>Early Head Start (pregnant women and children up to 3 years of age); Head Start (3-5 years of age)</i></li> </ul>	
Pre-K Counts	<ul style="list-style-type: none"> <li><a href="https://www.education.pa.gov/Early%20Learning/OCDEL%20Preschool%20Programs/Pages/default.aspx">https://www.education.pa.gov/Early%20Learning/OCDEL%20Preschool%20Programs/Pages/default.aspx</a> <i>For eligible 3-4 year olds</i></li> </ul>	<ul style="list-style-type: none"> <li><a href="https://compass.state.pa.us">Compass.state.pa.us</a></li> </ul>
<b>Home Visiting</b>		
Parenting support	<ul style="list-style-type: none"> <li>Allegheny Link: 1-866-730-2368</li> <li>Allegheny County Home Visiting programs: <a href="https://hellobabypgh.org/home-visiting/">https://hellobabypgh.org/home-visiting/</a></li> </ul>	<ul style="list-style-type: none"> <li>ACDHS Parent/Caregiver Support: <a href="https://alleghenycounty.us/Human-Services/Programs-Services/Basic-Needs/Parent-and-Caregiver-Support.aspx">https://alleghenycounty.us/Human-Services/Programs-Services/Basic-Needs/Parent-and-Caregiver-Support.aspx</a></li> </ul>
<b>Intimate Partner Violence</b>		
Intimate Partner Violence	<ul style="list-style-type: none"> <li>Women's Center and Shelter: 412-687-8005 <a href="https://www.wcspittsburgh.org/">https://www.wcspittsburgh.org/</a></li> <li>Allegheny Link: 1-866-730-2368</li> </ul>	<ul style="list-style-type: none"> <li>2-1-1</li> <li>24 Hour Crisis Hotline: 1-866-644-2882</li> <li>ACDHS Domestic violence help: <a href="https://alleghenycounty.us/Human-Services/Resources/Safety-and-Consumer-Protection/Domestic-Violence.aspx">https://alleghenycounty.us/Human-Services/Resources/Safety-and-Consumer-Protection/Domestic-Violence.aspx</a></li> </ul>
<b>Employment</b>		
Employment	<ul style="list-style-type: none"> <li>Career Link: <a href="https://www.careerlinkpittsburgh.com/">https://www.careerlinkpittsburgh.com/</a></li> </ul>	<ul style="list-style-type: none"> <li>EARN: <a href="https://www.dli.pa.gov/Individuals/careers/Pages/Employment-Advancement-and-Retention-Network-(Earn).aspx">https://www.dli.pa.gov/Individuals/careers/Pages/Employment-Advancement-and-Retention-Network-(Earn).aspx</a></li> </ul>
<b>Mental Health/Substance Use</b>		



Mental Health	<ul style="list-style-type: none"> <li>• Resolve (888) 796-8226</li> <li>• National Suicide Prevention Lifeline: 1-800-273-TALK (8255); <a href="https://suicidepreventionlifeline.org/">https://suicidepreventionlifeline.org/</a></li> <li>• Transgender Suicide Lifeline: 1-877-565-8860; <a href="https://www.translifeline.org/">https://www.translifeline.org/</a></li> </ul>	
Drug and Alcohol	<ul style="list-style-type: none"> <li>• POWER Line: 412-243-8755</li> <li>• Dept of Drug &amp; Alcohol Programs Crisis Hotline: 1-800-662-HELP (4357)</li> <li>• Resolve (888) 796-8226</li> </ul>	<ul style="list-style-type: none"> <li>• DDAP Crisis Hotline info: <a href="https://alleghenycounty.us/WorkArea/linkit.aspx?LinkIdentifier=id&amp;ItemID=6442455661">https://alleghenycounty.us/WorkArea/linkit.aspx?LinkIdentifier=id&amp;ItemID=6442455661</a></li> </ul>
<b>Elder Care</b>		
Caring for parents and grandparents	<ul style="list-style-type: none"> <li>• AAA SeniorLine: 412-350-5460, 1-800-344-4319</li> </ul>	<ul style="list-style-type: none"> <li>• ACDHS Older Adults: <a href="https://alleghenycounty.us/Human-Services/Programs-Services/Older-Adults.aspx">https://alleghenycounty.us/Human-Services/Programs-Services/Older-Adults.aspx</a></li> </ul>
<b>General</b>		
211 Service Portal	<ul style="list-style-type: none"> <li>• Call 2-1-1</li> <li>• <a href="http://pa211sw.org/search-services/">http://pa211sw.org/search-services/</a></li> </ul>	

## Family Tracking Tool

Use this tool for new referrals to help manage your caseload

Family Info	Notes	Tasks
Mother  Child  Phone  Reason		<input type="checkbox"/> Soft Contact <input type="checkbox"/> Phone Call/Needs <input type="checkbox"/> Basket Scheduled <input type="checkbox"/> Basket Delivered <input type="checkbox"/> Email Info <input type="checkbox"/> Resources Follow-up
Mother  Child  Phone  Reason		<input type="checkbox"/> Soft Contact <input type="checkbox"/> Phone Call/Needs <input type="checkbox"/> Basket Scheduled <input type="checkbox"/> Basket Delivered <input type="checkbox"/> Email Info <input type="checkbox"/> Resources Follow-up
Mother  Child  Phone  Reason		<input type="checkbox"/> Soft Contact <input type="checkbox"/> Phone Call/Needs <input type="checkbox"/> Basket Scheduled <input type="checkbox"/> Basket Delivered <input type="checkbox"/> Email Info <input type="checkbox"/> Resources Follow-up
Mother  Child  Phone  Reason		<input type="checkbox"/> Soft Contact <input type="checkbox"/> Phone Call/Needs <input type="checkbox"/> Basket Scheduled <input type="checkbox"/> Basket Delivered <input type="checkbox"/> Email Info <input type="checkbox"/> Resources Follow-up
Mother  Child  Phone  Reason		<input type="checkbox"/> Soft Contact <input type="checkbox"/> Phone Call/Needs <input type="checkbox"/> Basket Scheduled <input type="checkbox"/> Basket Delivered <input type="checkbox"/> Email Info <input type="checkbox"/> Resources Follow-up



Dear \_\_\_\_\_,

My name is \_\_\_\_\_ from the \_\_\_\_\_  
Family Center. We want to welcome your new baby to the world with this box of baby  
essentials. We hope these items give you a boost today!

We'd love to talk with you to tell you some other ways we can help you and your new  
baby. You can give us a call at your convenience at \_\_\_\_\_.

We hope to hear from you!

Sincerely,

\_\_\_\_\_



Center name: \_\_\_\_\_

Phone number: \_\_\_\_\_

## Family Interest Survey

**Caregiver Name:** \_\_\_\_\_

*Thanks for stopping by the center! We can help you access resources like housing assistance or job training, we offer classes and activities for you and your children, and we can help you meet other families in the neighborhood.*

*Now we'd like to get to know you a little better! Please check off the services or programs you are interested in below.*

☐ **Basics**

- ☐ Food
- ☐ Housing and rental assistance
- ☐ Diapers, formula, and other baby items
- ☐ Transportation
- ☐ Clothing
- ☐ Help with utilities
- ☐ Legal services

☐ **Enroll in Benefits**

- ☐ WIC
- ☐ SNAP (food assistance)
- ☐ TANF (cash assistance)
- ☐ Health Insurance
- ☐ Child Care Works (formerly CCIS)
- ☐ Energy Assistance
- ☐ Long Term Care services

☐ **Physical & Mental Health (CHILDREN)**

- ☐ Immunization clinics
- ☐ Dental clinics
- ☐ Primary care
- ☐ Specialty care
- ☐ Mental health, behavior, or safety supports
- ☐ Child development & milestones
- ☐ Special Education

☐ **Physical & Mental Health (ADULTS)**

- ☐ Primary care
- ☐ Specialty care (including women's health and prenatal)
- ☐ Mental health, emotional, or safety supports
- ☐ Opioid or substance use disorder

☐ **Parenting**

- ☐ Home visiting (one-on-one support)
- ☐ Group parenting classes
- ☐ Fatherhood programs
- ☐ Grandparent or Kinship programs
- ☐ Parent Support Groups

☐ **Childcare & Learning Support**

- ☐ Infant or toddler activities
- ☐ Preschool-age activities
- ☐ Early Head Start, Head Start, Pre-K Counts, or childcare
- ☐ After-school programs or summer camps
- ☐ Early Intervention or Special Education

☐ **Adult Education & Employment**

- ☐ GED classes
- ☐ ESL classes
- ☐ Resume writing
- ☐ Finding a job or career counseling
- ☐ Career and certification training
- ☐ Continuing education
- ☐ Budgeting and help with finances

☐ **Social Activities**

- ☐ Family Fun Nights
- ☐ Story times
- ☐ Craftmaking
- ☐ Cooking classes
- ☐ Fitness & wellness activities
- ☐ Parent and caregiver social activities



## FAQs for Predictive Risk Model

*(Family Care Connections, Duquesne, McKeesport, & Steel Valley Centers ONLY)*

### Why are you calling me?

I'm calling from [Healthy Start or Family Center] to talk with you about Hello Baby, which I hope you heard about while you were in the hospital for your baby's birth. Hello Baby offers a lot of resources and supports to new parents, both for the baby and for you, and we would like to offer some of these services to you. We wish we could offer them to every new parent in the County, but we don't have the resources to do that, so we are offering them to select families. These services are completely voluntary so it's up to you whether or not you choose to participate. Are you interested in learning more about the services you're eligible for?

### Why was I selected?

To begin with, you live in the area where we are starting the program. It will expand eventually to serve the whole County, but right now we've started with your neighborhood.

In addition, we have a partnership with Allegheny County's Department of Human Services (DHS). DHS provides us with the names of new parents who might be interested in Hello Baby. Certain staff there have access to information about other state or County services you have used or are using, and that information is examined to see if Hello Baby supports might be right for you. We don't see the information they use because it's confidential – we just get a list of names and contact information (phone number and address).

### How did I get put on that list?

To determine eligibility for Hello Baby, DHS tries to match Allegheny County birth records with other records that are stored electronically in what they call the "data warehouse." The County's data warehouse keeps records of services provided to County residents over time, along with other information about their clients, like date of birth, gender and address. If they find a match, they use those service records and information to include the family in a "predictive risk model." This model shows how likely a family might be to have future involvement with the County's child welfare system. The goal of Hello Baby is to allow families that have the greatest need to receive additional supports.

### Who else can see my information?





Your service information is stored electronically in the data warehouse, but the results of the predictive risk model used to determine a family's eligibility for Hello Baby services are seen only by the person who runs the model. This information is confidential, so when the names of eligible families are shared with providers like us, we don't see the information used to arrive at that decision.

### Can I see the information that they used?

Your service information is always available to you, and you can find it by going to [www.AccessMyInfo.alleghenycounty.us](http://www.AccessMyInfo.alleghenycounty.us) and registering for an account. If you have any trouble, you'll be connected to the Director's Action Line and someone will help you register and access your records.



# Synergy Guidance



## FOR SITE DIRECTORS:

When a new electronic referral is sent to you, you will see it appear on your Pending/Outreach pane of your Dashboard. The Dashboard is the screen that loads when you first log on to Synergy.

You can have many different types of electronic referrals and some important information to pay attention to are in the Category, Source and Critical? columns.

- The Category column will let you know if this referral is for a family to receive general support from the center (Socialization) or home visiting services (Home Visiting).
- The Source column will let you know if this is a referral from Allegheny Link (Link), Children, Youth and Families (KIDS) or the Predictive Risk Model for Hello Baby (HB).
- The Critical? column will let you know if this family is court-ordered to work with the center (exclamation point icon), is a referral from a medical provider, like a hospital or pediatrician, (stethoscope icon) or is a referral from the Predictive Risk Model for Hello Baby (HB icon).

### My Dashboard

Supervisor Log

Provider

-Select-

Facility

-Select-

Assigned Worker

My Dashboard

Hold

Clear

Actions

Search Existing Clients

Group Events

Transportation

Pending (Outreach) (96)

Search :

Creation Date	Case ID	Case Name	Category	Source	Worker	Enrollment Status	Critical?	Contacts
8/25/2020	<a href="#">32475</a>	<a href="#">ABDULLAH</a>	Socialization	KIDS		Pending		
1/2/2018	<a href="#">12492</a>	<a href="#">Alston</a>	Socialization	FSC		Pending		
9/15/2020	<a href="#">32764</a>	<a href="#">Alyahya</a>	Home Visiting	Link		Pending		
5/31/2018	<a href="#">17789</a>	<a href="#">Anderson</a>	Socialization	FSC		Pending		
9/17/2020	<a href="#">32823</a>	<a href="#">Antigua</a>	Socialization	FSC		Pending		
9/15/2020	<a href="#">32767</a>	<a href="#">Auge</a>	Home Visiting	Link		Pending		
6/26/2020	<a href="#">31609</a>	<a href="#">Bailey</a>	Socialization	FSC		Pending		
7/24/2020	<a href="#">31970</a>	<a href="#">BANKS</a>	Socialization	KIDS		Pending		
9/3/2020	<a href="#">32617</a>	<a href="#">Bates</a>	Home Visiting	Link		Pending		
4/11/2019	<a href="#">9051</a>	<a href="#">Broglin</a>	Socialization	FSC		Pending		



Whenever you receive a new electronic referral, you want to review the information within the case in Synergy. Depending on the type of referral, you may see additional information, but at a minimum, you should always see:

- The individuals within the case on the Household Info screen

Household Members									
<div>Add Member</div> <div><input checked="" type="radio"/> Active members <input type="radio"/> All members</div>									
Member Name	Legal Sex	Birth Date	SSN	Relationship to HOH	Involved in Program?	Active?	MCIID or Client ID	Source	
ARIELLE ABDULLAH	Female			Self	Yes	Y	1000062989	KIDS	
TAYLOR ABDULLAH	Female				Yes	Y	1001020219	KIDS	
Show 10 entries <span>First Previous 1 Next Last</span>									

- An address for the HOH on the Contact Info screen

Household Member List														
Member Name	Legal Sex	Birth Date	Relationship to HOH	Source										
ARIELLE ABDULLAH	Female		Self	KIDS										
TAYLOR ABDULLAH	Female			KIDS										
Show 10 entries <span>First Previous 1 Next Last</span>														
Contact Info														
<div>Address Phone Other Gender and Sexuality Communications</div> <div><div>Add Address</div><table><tr><th>Address Type</th><th>Address Summary</th><th>Primary Address</th><th>Validated?</th><th>Last Updated Date</th></tr><tr><td>Home</td><td>1119 CHARLES ST Mc Kees Rocks,PA, 15136-3009</td><td>Yes</td><td>No</td><td>8/25/2020</td></tr></table><div>Show 10 entries <span>First Previous 1 Next Last</span></div><div><div>Validate</div><div>Delete</div></div></div>					Address Type	Address Summary	Primary Address	Validated?	Last Updated Date	Home	1119 CHARLES ST Mc Kees Rocks,PA, 15136-3009	Yes	No	8/25/2020
Address Type	Address Summary	Primary Address	Validated?	Last Updated Date										
Home	1119 CHARLES ST Mc Kees Rocks,PA, 15136-3009	Yes	No	8/25/2020										

After you have finished reviewing the information, you need to go to the Summary screen and assign a worker. You can click on Assigned Worker to see all the individuals who can carry a caseload at your center. Select a Worker and enter an Assignment Date. The Assignment Date is the date you are assigning the case to a worker.



▼ Summary

\*Denotes Required Fields    \*\* Denotes Half Mandatory Fields    Ctrl + Click to Multi-Select and Deselect

Provider *		Facility *	
FOCUS ON RENEWAL STO ROX NEIGHBORHOOD CENTER		POSITIVE PARENTING PROGRAM-FATHER RYAN ART CENTER ▼	
Case Name *	Enrollment Status *	Assigned Worker	Home Visiting Status ⓘ
ABDULLAH	Pending	-Select- ▼	-Select- ▼
Case ID	Status Date *	Assignment Date	Home Visiting Date
32475	08/25/2020		



## FOR SITE DIRECTORS – OUT OF OFFICE:

If you are off or unable to access Synergy to assign a worker to a new electronic referral, your staff are easily able to perform the above steps. They will not be able to access the new Pending cases via your Dashboard, but they can access the new Pending cases by using the Search at the top of their screen.

The screenshot shows the top navigation bar of the Synergy dashboard. The 'Search' link is highlighted with a red arrow. Other navigation links include 'Dashboard', 'Reports', 'Admin', 'Case Contact-Quick Entry', and a user profile for 'Samantha Litvak'. Below the navigation bar, the text 'My Dashboard' is visible on the left, and a 'Supervisor Log' button is on the right.

From here they will click on Advanced Search to be able to search using more criteria.

The screenshot shows the 'Search Criteria' section. It includes a 'Search By' dropdown menu set to '--Select--', a search input field, and a '-Select-' dropdown menu. A red arrow points to the 'Advanced Search' link located below the search input field.

On the Advanced Search screen, they will select the Provider and Facility name and select Pending under Case Status. Click Search and in the Search Results, all Pending cases will appear. They can click on the Case ID to enter the case, review the included information, and assign a worker.

The screenshot shows the 'Advanced Search Criteria' form. It contains several input fields and dropdown menus: 'Case ID', 'Client ID', 'Worker' (set to '-Select-'), 'Provider' (set to 'FOCUS ON RENEWAL STO ROX NEIK'), 'Facility' (set to 'POSITIVE PARENTING PROGRAM-FA'), 'Case Status' (set to 'Pending'), 'First Name', 'Last Name', 'Home Visiting Status' (set to '-Select-'), 'Date From', and 'Date To'. A red arrow points to the 'Search' button at the bottom right.



## FOR CENTER STAFF:

When a new electronic referral is assigned to you, you will see it appear on your Pending/Outreach pane of your Dashboard. The Dashboard is the screen that loads when you first log on to Synergy.

You can have many different types of electronic referrals and some important information to pay attention to are in the Category, Source and Critical? columns.

- The Category column will let you know if this referral is for a family to receive general support from the center (Socialization) or home visiting services (Home Visiting).
- The Source column will let you know if this is a referral from Allegheny Link (Link), Children, Youth and Families (KIDS) or the Predictive Risk Model for Hello Baby (HB).
- The Critical? column will let you know if this family is court-ordered to work with the center (exclamation point icon), is a referral from a medical provider, like a hospital or pediatrician, (stethoscope icon) or is a referral from the Predictive Risk Model for Hello Baby (HB icon).

### My Dashboard

Supervisor Log

Provider

-Select-

Facility

-Select-

Assigned Worker

My Dashboard

Hold

Clear

Actions

Search Existing Clients

Group Events

Transportation

Pending (Outreach) (96)

Search :

Creation Date	Case ID	Case Name	Category	Source	Worker	Enrollment Status	Critical?	Contacts
8/25/2020	<a href="#">32475</a>	<a href="#">ABDULLAH</a>	Socialization	KIDS		Pending		
1/2/2018	<a href="#">12492</a>	<a href="#">Alston</a>	Socialization	FSC		Pending		
9/15/2020	<a href="#">32764</a>	<a href="#">Alyahya</a>	Home Visiting	Link		Pending		
5/31/2018	<a href="#">17789</a>	<a href="#">Anderson</a>	Socialization	FSC		Pending		
9/17/2020	<a href="#">32823</a>	<a href="#">Antigua</a>	Socialization	FSC		Pending		
9/15/2020	<a href="#">32767</a>	<a href="#">Auge</a>	Home Visiting	Link		Pending		
6/26/2020	<a href="#">31609</a>	<a href="#">Bailey</a>	Socialization	FSC		Pending		
7/24/2020	<a href="#">31970</a>	<a href="#">BANKS</a>	Socialization	KIDS		Pending		
9/3/2020	<a href="#">32617</a>	<a href="#">Bates</a>	Home Visiting	Link		Pending		
4/11/2019	<a href="#">9051</a>	<a href="#">Broglin</a>	Socialization	FSC		Pending		



Whenever you are assigned a new electronic referral, you want to review the information within the case in Synergy. Depending on the type of referral, you may see additional information, but at a minimum, you should always see:

- The individuals within the case on the Household Info screen

Household Members									
<div>Add Member</div> <div><input checked="" type="radio"/> Active members <input type="radio"/> All members</div>									
Member Name	Legal Sex	Birth Date	SSN	Relationship to HOH	Involved in Program?	Active?	MCIID or Client ID	Source	
ARIELLE ABDULLAH	Female			Self	Yes	Y	1000062989	KIDS	
TAYLOR ABDULLAH	Female				Yes	Y	1001020219	KIDS	
Show 10 entries <span>First Previous 1 Next Last</span>									

- An address for the HOH on the Contact Info screen

Household Member List

Member Name	Legal Sex	Birth Date	Relationship to HOH	Source
ARIELLE ABDULLAH	Female		Self	KIDS
TAYLOR ABDULLAH	Female			KIDS

Show

10

entries

First

Previous

1

Next

Last

Contact Info

Address

Phone

Other

Gender and Sexuality

Communications

Add Address

Address Type	Address Summary	Primary Address	Validated?	Last Updated Date
Home	1119 CHARLES ST Mc Kees Rocks,PA, 15136-3009	Yes	No	8/25/2020

Show

10

entries

First

Previous

1

Next

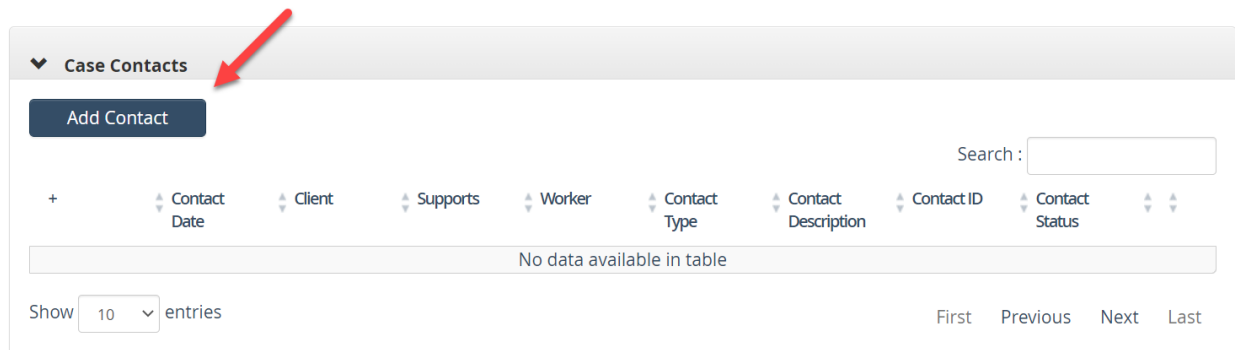
Last

Validate

Delete



You will want to document your outreach attempts within the Contact Notes screen.



**Case Contacts**

[Add Contact](#)

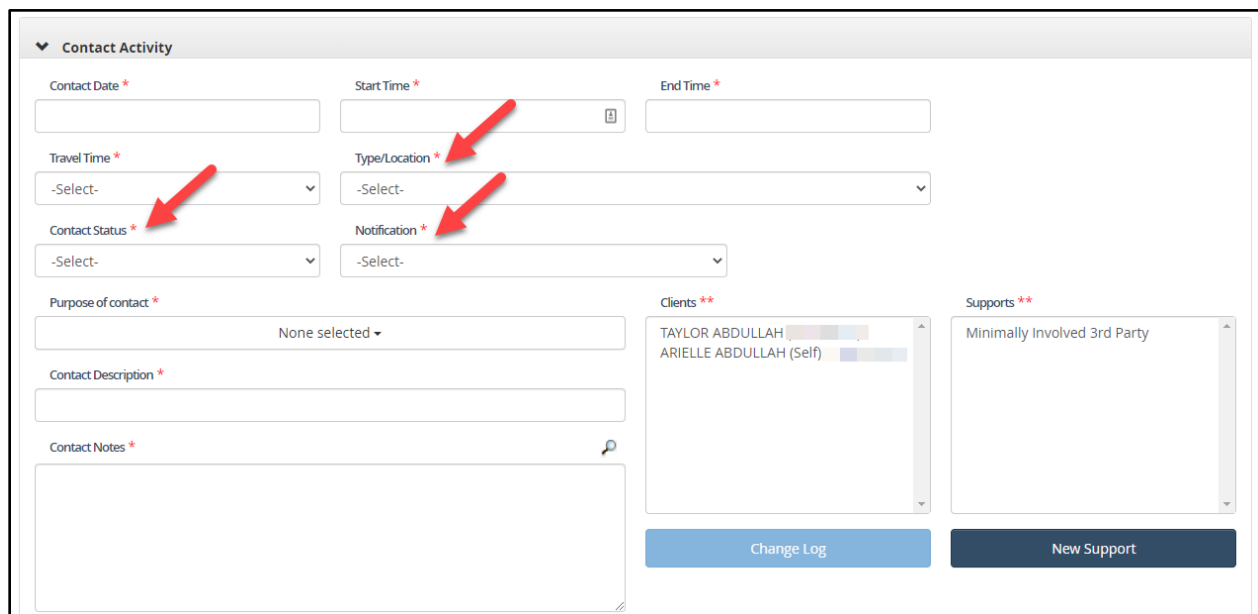
Search :

+	Contact Date	Client	Supports	Worker	Contact Type	Contact Description	Contact ID	Contact Status
No data available in table								

Show  entries

First Previous Next Last

- Type/Location is the way in which you are attempting to reach the family. It could be in the form of text messages, phone calls, letters or e-mails and visits to the family's home.
- Contact Status is whether you were successfully able to reach the family.
- Notification is if the family knew you were attempting to contact them or not.



**Contact Activity**

Contact Date \*  Start Time \*  End Time \*

Travel Time \*  Type/Location \*

Contact Status \*  Notification \*

Purpose of contact \*

Contact Description \*

Contact Notes \*

**Clients \*\***

TAYLOR ABDULLAH  
ARIELLE ABDULLAH (Self)

**Supports \*\***

Minimally Involved 3rd Party

[Change Log](#) [New Support](#)



## ENROLLMENT STATUS:

Based on your outreach attempts and/or interactions with the family, you will want to update the statuses in the Summary screen to reflect the family's desire to be involved in the center/home visiting services.

For Socialization referrals, you will need to update the Enrollment Status and Status Date. Status Date is the date their Enrollment Status changes.

- Pending just means new. The case can stay in Pending status while you are outreaching to the family.
- Not Interested means you are closing the case. When marking a case as Not Interested, select one of the following Not Interested Reasons:
  - Member(s) Already Enrolled – When you receive a referral for a family who is already being served by your center and has an existing case in Synergy.
  - Member(s) Refused Services – When you have spoken with someone from the family and they have expressed a desire to not receive any services or supports from the center.
  - Member(s) Cannot Be Located – When you have attempted to contact the family in a variety of ways (phone, text, porch drop) and have had no interaction with anyone from the family.
- Drop-in means the family would like to use the center as a resource but does not wish to enroll as a member of the center at this time. This is also a category to use for individuals who do not have children under 18 years old.
- Enrolled means the family would like to enroll in the center as a member and is willing to provide more information about their family members and their situation. Families who want to enroll should have children under 18 years old.

▼ Summary

\*Denotes Required Fields   \*\* Denotes Half Mandatory Fields   Ctrl + Click to Multi-Select and Deselect

Provider \*

FOCUS ON RENEWAL STO ROX NEIGHBORHOOD CENTER

Facility \*

POSITIVE PARENTING PROGRAM-FATHER RYAN ART CENTER ▼

Case Name \*

ABDULLAH

Enrollment Status \*

Pending ▼

Assigned Worker

-Select- ▼

Home Visiting Status ⓘ

-Select- ▼

Case ID

32475

Status Date \*

08/25/2020

Assignment Date

Home Visiting Date

## HOME VISITING:

For Home Visiting referrals, you will need to update both the Enrollment and Home Visiting Statuses and Status Dates. For the Home Visiting Status definitions, hover your mouse over the blue circle with an "i" in it.

▼ Summary

\*Denotes Required Fields   \*\* Denotes Half Mandatory Fields   Ctrl + Click to Multi-Select and Deselect

Provider \*

UPMC CHILDREN'S HOSPITAL OF PITTSBURGH

Facility \*

FAMILY CARE CONNECTION AT BRADDOCK

Case Name \*

Grayson

Enrollment Status \*

Pending

Assigned Worker

-Select-

Home Visiting Status

Case ID

32834

Status Date \*

09/17/2020

Assignment Date

Save

Snapshot Report

▼ Next Steps

Description of the Home Visiting Statuses:

Pending	Default status when a new referral is sent to your program
In Progress	Program representative reaches out to the client and/or begins working on the referral
Waitlist	Client is conditionally accepted to the program but there is a waitlist for the program
Enrolled	Referral is accepted and client is enrolled in the program
Close Case	Client leaves and/or completes the program
Follow - Up	Family potentially interested but not right now
Not Interested	Staff has offered program involvement to a family, and family has declined all services

▼ Summary

\*Denotes Required Fields   \*\* Denotes Half Mandatory Fields   Ctrl + Click to Multi-Select and Deselect

Provider \*

UPMC CHILDREN'S HOSPITAL OF PITTSBURGH

Facility \*

FAMILY CARE CONNECTION AT BRADDOCK

Case Name \*

Grayson

Enrollment Status \*

Pending

Assigned Worker

-Select-

Home Visiting Status

Pending

Case ID

32834

Status Date \*

09/17/2020

Assignment Date

Home Visiting Date \*

09/17/2020



## BAG DELIVERY:

To document the Care Bag delivery to families, enter it as a recurring Group Event each week and record the individuals who received boxes as Attendees to the Group Event. Even if you are delivery Care Bags throughout the week to each family individually, it will be difficult to easily track who has received a Care Bag from the Contact Notes. When you need to plan follow-up contact with those individuals who have received a Care Bag, you can use the Group Event calendar as a reference. Make sure to finalize the Group Event each week after Attendees have been added.

Below is an example of how-to set-up a recurring Group Event for the Care Bag Delivery.

### Event Information

**Event Information**

\*Denotes Required Fields    \*\*Denotes Half Mandatory Fields    Ctrl + Click to Multi-Select and Deselect

Provider *	Facility *
ALLEGHENY INTERMEDIATE UNIT	AIU - STEEL VALLEY FAMILY CENTER

Start Date *	Start Time *	End Time *	Total Duration :- 1 : 00	<input checked="" type="checkbox"/> Recurring Event
09/04/2020	12:00 pm	01:00 pm		

**Recurrence**

End Date *	Frequency *	Recur every	1	week(s) on: *
01/01/2021	Weekly	Week Day(s) *		
		<input type="checkbox"/> Sunday	<input type="checkbox"/> Monday	<input type="checkbox"/> Tuesday
		<input type="checkbox"/> Thursday	<input checked="" type="checkbox"/> Friday	<input type="checkbox"/> Saturday
				<input type="checkbox"/> Wednesday

Event ID	Event Title *	Event Type *	Event Location *
0	Hello Baby Care Bag Delivery	Self Sufficiency/Goal Plan	Public Location

Event Details *	Event Status	<input type="checkbox"/> Home Visiting Model Group
Delivery of Hello Baby Care Bag to referr.		

## IMPORTANT NOTES ABOUT BAG DELIVERY:

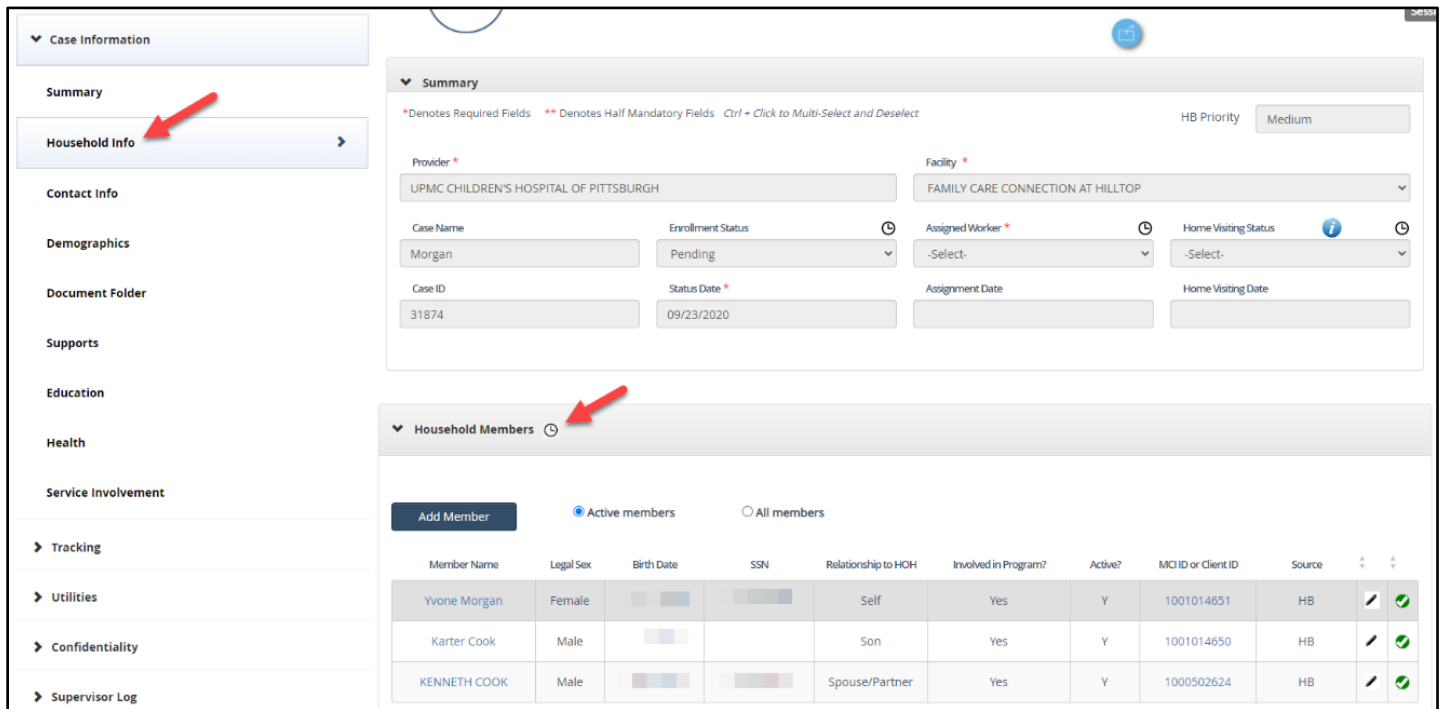
\*\*We will NOT be entering Transportation records to document delivery of the Care Bags to families because we are unable to add Pending and Drop-in cases to Transportations in Synergy and not all centers will be using the agency van to drop off the Care Bags. If you are using the agency van to deliver the Care Bags, you can record the mileage in a Transportation record, but do not add any individuals to the trip.

\*\*We will NOT be entering Contact Notes in each family's case when a Care Bag has been delivered. The finalized Group Event will create a Contact Note within the family's case to capture the delivery of the Care Bag. If you have an interaction with a family during the Care Bag delivery that you want to make note of, edit the Contact Note that is created from the finalized Group Event.

## PREDICTIVE RISK REFERRALS:

*(Family Care Connections, Duquesne, McKeesport, & Steel Valley Centers ONLY)*

The HB PRM referral will come over with the individuals on the birth record. This means there will always be a mother (HOH) and a baby or babies (Son and/or Daughter) in the Synergy case. If a father was listed on the birth record, there will be a Spouse/Partner in the Synergy case as well. There may be times when the baby's name is not chosen by the time the birth record is completed. In these scenarios, the baby's name could be "Baby Boy/Girl" or "Baby (Mother/Father's Last Name)"



**Case Information**

- Summary
- Household Info**
- Contact Info
- Demographics
- Document Folder
- Supports
- Education
- Health
- Service Involvement

**Summary**

\*Denotes Required Fields \*\* Denotes Half Mandatory Fields Ctrl + Click to Multi-Select and Deselect

HB Priority: Medium

Provider: UPMC CHILDREN'S HOSPITAL OF PITTSBURGH Facility: FAMILY CARE CONNECTION AT HILLTOP

Case Name: Morgan Enrollment Status: Pending Assigned Worker: -Select- Home Visiting Status: -Select-

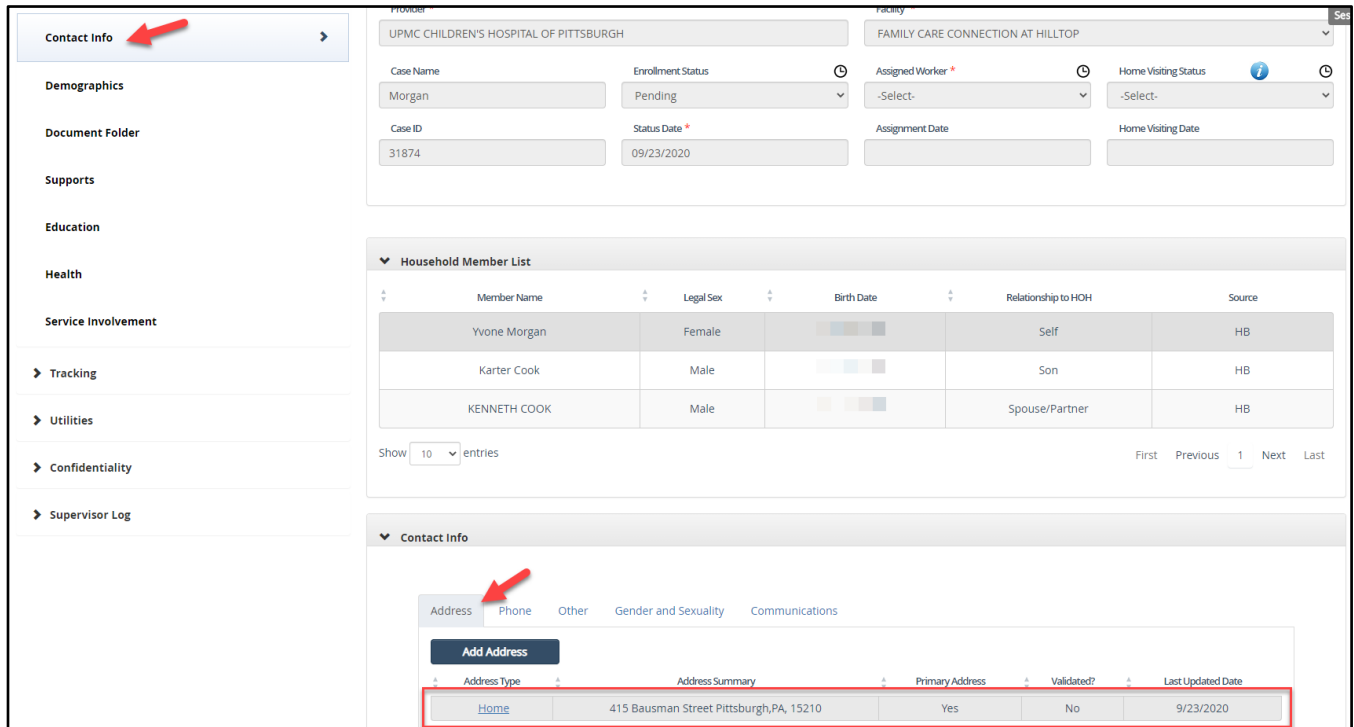
Case ID: 31874 Status Date: 09/23/2020 Assignment Date: Home Visiting Date:

**Household Members**

Add Member Active members All members

Member Name	Legal Sex	Birth Date	SSN	Relationship to HOH	Involved in Program?	Active?	MCI ID or Client ID	Source		
Yvone Morgan	Female			Self	Yes	Y	1001014651	HB		
Karter Cook	Male			Son	Yes	Y	1001014650	HB		
KENNETH COOK	Male			Spouse/Partner	Yes	Y	1000502624	HB		

The HB PRM referral will come over with Mother's address that was listed on the birth record in the Contact Info screen under the Address tab. Because there is a lag from when the birth record was completed and the referral was sent to Synergy, this address may not be correct or up-to-date.



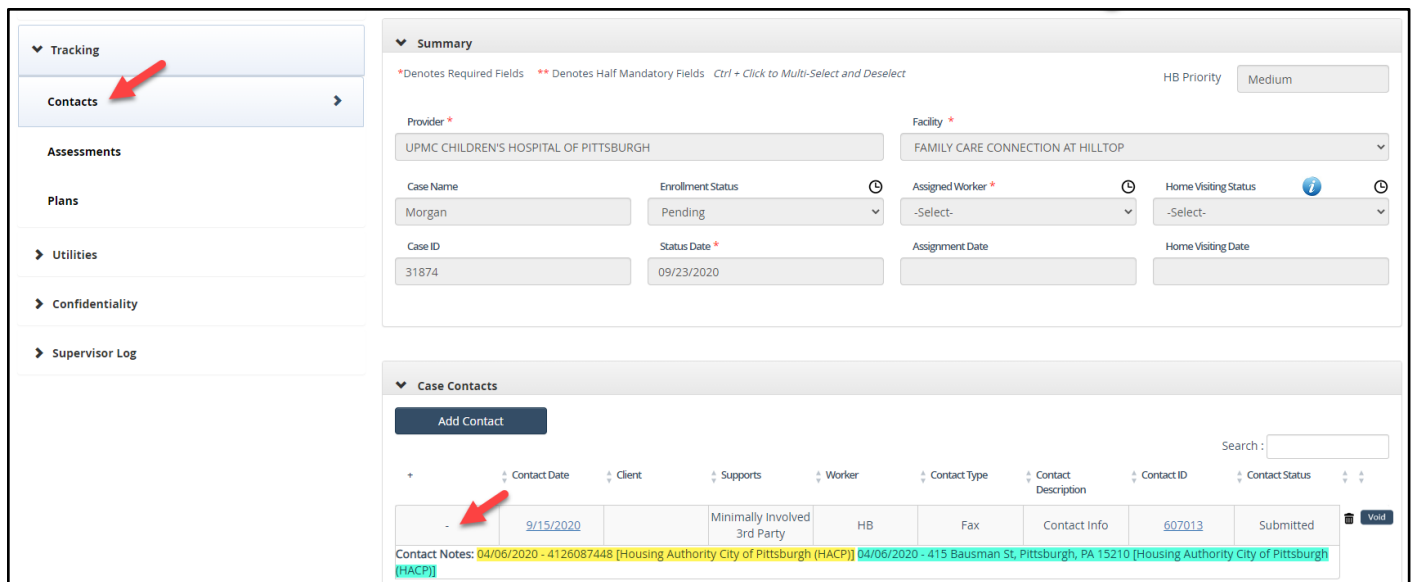
Member Name	Legal Sex	Birth Date	Relationship to HOH	Source
Yvone Morgan	Female		Self	HB
Karter Cook	Male		Son	HB
KENNETH COOK	Male		Spouse/Partner	HB

Address Type	Address Summary	Primary Address	Validated?	Last Updated Date
Home	415 Bausman Street Pittsburgh, PA, 15210	Yes	No	9/23/2020

To supplement the lack of Contact Info from the birth record, the HB PRM referral will have one Contact Note within the case. This Contact Note will provide you with any additional address or phone numbers DHS has on record for the household members.

Click on the plus sign on the far left side of the row to see the additional addresses or phone numbers. For example, this case has a phone number (highlighted in yellow) and address (highlighted in teal) from the Housing Authority City of Pittsburgh that was updated on 4/6/2020. If DHS does not have any additional contact information for the household members, the Contact Note will say "No contact information available."



Contact Date	Client	Supports	Worker	Contact Type	Contact Description	Contact ID	Contact Status
9/15/2020	Minimally Involved 3rd Party	HB	Fax	Contact Info	607013	Submitted	

Contact Notes: 04/06/2020 - 4126087448 [Housing Authority City of Pittsburgh (HACP)] 04/06/2020 - 415 Bausman St, Pittsburgh, PA 15210 [Housing Authority City of Pittsburgh (HACP)]



## REASSIGNING A CASE TO ANOTHER CENTER:

In almost all cases, you will not need to reassign or transfer a case to another center. There are a few instances where, after conducting initial outreach, it may be appropriate for you to transfer the family to another center.


### When should you transfer a case to another center?

- If there is an error with the hospital referral (i.e. the family was referred to the Latino Center but does not speak Spanish)
- If the family is already engaged in another center
- If the family is ESL and may be better served at a center with bilingual staff
- After initial outreach and bag delivery, the family determines that another center is more convenient for them and requests to transfer

### In these instances, follow this process:

1. Contact the family. Confirm the family's preferred center location.
2. Contact the new center and provide family's information. The new center should open a case for the family and reach out to them, then schedule a bag delivery if needed.
3. Change the family's status to "Not Interested" to close the case.

### When should you NOT transfer a case to another center?

- If the referral has the  logo (*Family Care Connections, Duquesne, McKeesport, and Steel Valley only*)
- If your caseload is full – in this case, please take advantage of the many other resources available to the family, including the Health Department nurses for home visiting. And, you can still encourage the family to engage in other center offerings even if you cannot enroll them in home visiting right now.

If there is any other reason that you think the family is not a good fit for your center, please always provide initial outreach, bag delivery, and 2-week follow-up. There may be a reason they were referred to you that is not listed in the original referral, which you may learn through conversations with them. After follow-up, if you and the family determine another center is a better fit, please follow the steps to transfer the case.



## External Referral Guidance





One of the ways you can assist families is by making the appropriate referrals to partners. Assess what the family needs, and then follow the guidance below.

- For nurse referrals to the Health Department, use this link: <https://www.alleghenycounty.us/Health-Department/Health-Services/Maternal-and-Child-Health-Services/Enrollment-Form.aspx>. Fill out the form by selecting "Other", then note in the text box that this is a Hello Baby referral.
- For all other referrals, please use the form on page 27. Keep a copy for your records, and provide a copy to the family and any contacts available at the partner agency.

### EXTERNAL REFERRAL FORM:

Enter the case where an External Referral Form has been completed. Navigate to the Contact Notes screen and click Add Contact.

Enter all mandatory information in the Contact Note. See below for additional details on how to transfer information from the External Referral Form into the Contact Note.

\*\* Make sure to select "Referral for/to Services" in the Purpose of Contact dropdown, in addition to any other selections that are relevant. \*\*

1. "Where are you referring?" can be entered in the Referral Information section in the Referred To box. This is the name of the organization, agency or program the individual(s) are being referred to.
2. "Who is the contact at that organization?" can be entered into the Referral Details box. Type in any other associated information about the referral being made.
3. "Family member(s) being referred" can be documented by selecting the appropriate individuals' names from the Clients box.
4. "Outcome of Referral" can be documented in the Referral Information section under Was the referral used? And Was the referral helpful? You may not know this information at the time of the referral so you can always come back and update it from the main Contact Notes screen. See next page for instructions

Where are you referring? **1**

Who is the contact at that organization? **2**

Family member(s) being referred: **3**

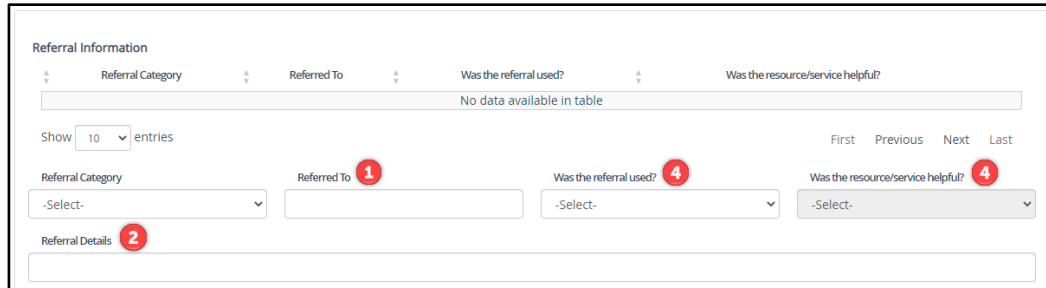
Name	Birthdate

Outcome of Referral (to be completed by FC Staff) **4**

Date: \_\_\_\_\_

**Clients** \*\* **3**

Mary Monkey (Spouse/Partner) (2/5/2006)  
Glenn Gorilla (Self) (12/8/1999)



Referral Information

Referral Category	Referred To	Was the referral used?	Was the resource/service helpful?
No data available in table			

Show 10 entries

First Previous Next Last

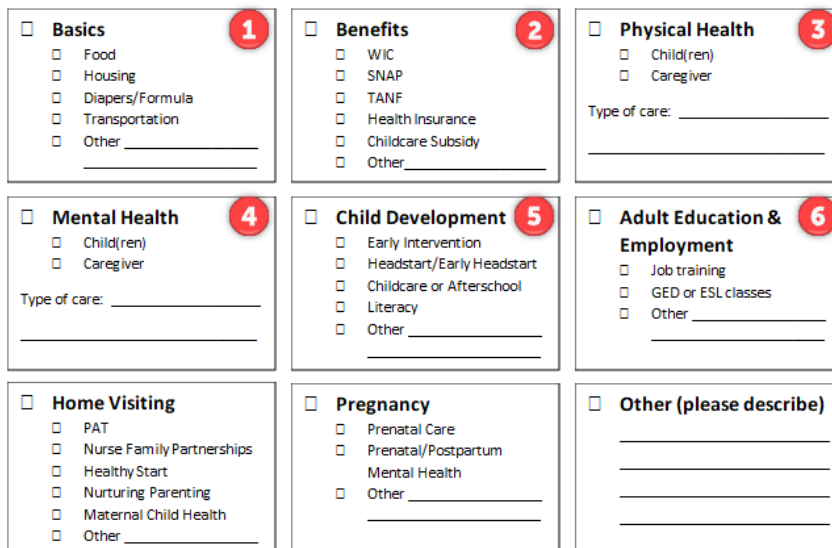
Referral Category: -Select- Referred To: 1 Was the referral used?: 4 Was the resource/service helpful?: 4

Referral Details: 2


- Continued – To enter “Outcome of Referral” after the referral was made, scroll to the bottom of the Contact Note screen to the Referral Information Summary section. This contains a list of all the referrals made and documented in a Contact Note for a case. You can answer Was the referral used? and Was the resource/service helpful? from here and click Save.

For the “Reason for referral,” select the appropriate match in the Referral Information section of the Contact Note under Referral Category.

Reason for referral:



<input type="checkbox"/> <b>Basics</b> 1 <input type="checkbox"/> Food <input type="checkbox"/> Housing <input type="checkbox"/> Diapers/Formula <input type="checkbox"/> Transportation <input type="checkbox"/> Other _____	<input type="checkbox"/> <b>Benefits</b> 2 <input type="checkbox"/> WIC <input type="checkbox"/> SNAP <input type="checkbox"/> TANF <input type="checkbox"/> Health Insurance <input type="checkbox"/> Childcare Subsidy <input type="checkbox"/> Other _____	<input type="checkbox"/> <b>Physical Health</b> 3 <input type="checkbox"/> Child(ren) <input type="checkbox"/> Caregiver Type of care: _____
<input type="checkbox"/> <b>Mental Health</b> 4 <input type="checkbox"/> Child(ren) <input type="checkbox"/> Caregiver Type of care: _____	<input type="checkbox"/> <b>Child Development</b> 5 <input type="checkbox"/> Early Intervention <input type="checkbox"/> Headstart/Early Headstart <input type="checkbox"/> Childcare or Afterschool <input type="checkbox"/> Literacy <input type="checkbox"/> Other _____	<input type="checkbox"/> <b>Adult Education &amp; Employment</b> 6 <input type="checkbox"/> Job training <input type="checkbox"/> GED or ESL classes <input type="checkbox"/> Other _____
<input type="checkbox"/> <b>Home Visiting</b> <input type="checkbox"/> PAT <input type="checkbox"/> Nurse Family Partnerships <input type="checkbox"/> Healthy Start <input type="checkbox"/> Nurturing Parenting <input type="checkbox"/> Maternal Child Health <input type="checkbox"/> Other _____	<input type="checkbox"/> <b>Pregnancy</b> <input type="checkbox"/> Prenatal Care <input type="checkbox"/> Prenatal/Postpartum <input type="checkbox"/> Mental Health <input type="checkbox"/> Other _____	<input type="checkbox"/> <b>Other (please describe)</b> _____ _____ _____



Referral Category

-Select- 1

- Basic Needs 1
- Child Care/Before or After School 5
- Child Care/Daycare 5
- Children
- Community Supports
- Early Intervention 5
- Education/Training 6
- Employment 6
- Financial Assistance
- Food Assistance 1
- Housing 1
- I&A
- Insurance 2
- Legal Assistance
- Mental Health Treatment 4
- Physical Health/Emergency Medical Ca 3
- Physical Health/Health Care 3
- Public Benefits 2
- Relationships/Family Functioning
- Relationships/Parenting Skills
- Rx Benefits
- Safety Risk/Emergency Disaster Relief
- Safety Risk/Emergency Protection
- Substance Use Treatment
- Tangible Goods 1
- Transportation 1
- Utilities
- Waiver/In Home Services



Staff use only:

Case ID: \_\_\_\_\_

Center: \_\_\_\_\_

## External Referral Form

Referring FC Location: \_\_\_\_\_ Phone: \_\_\_\_\_

Referring FC Staff: \_\_\_\_\_ Date: \_\_\_\_\_

Where are you referring? \_\_\_\_\_

Who is the contact at that organization? \_\_\_\_\_

Family member(s) being referred:

Name	Birthdate	Phone

Reason for referral:

<input type="checkbox"/> <b>Basics</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Food</li><li><input type="checkbox"/> Housing</li><li><input type="checkbox"/> Diapers/Formula</li><li><input type="checkbox"/> Transportation</li><li><input type="checkbox"/> Other _____</li></ul>	<input type="checkbox"/> <b>Benefits</b> <ul style="list-style-type: none"><li><input type="checkbox"/> WIC</li><li><input type="checkbox"/> SNAP</li><li><input type="checkbox"/> TANF</li><li><input type="checkbox"/> Health Insurance</li><li><input type="checkbox"/> Childcare Subsidy</li><li><input type="checkbox"/> Other _____</li></ul>	<input type="checkbox"/> <b>Physical Health</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Child(ren)</li><li><input type="checkbox"/> Caregiver</li></ul> Type of care: _____
<input type="checkbox"/> <b>Mental Health</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Child(ren)</li><li><input type="checkbox"/> Caregiver</li></ul> Type of care: _____	<input type="checkbox"/> <b>Child Development</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Early Intervention</li><li><input type="checkbox"/> Headstart/Early Headstart</li><li><input type="checkbox"/> Childcare or Afterschool</li><li><input type="checkbox"/> School-age Consult</li><li><input type="checkbox"/> Literacy</li><li><input type="checkbox"/> Other _____</li></ul>	<input type="checkbox"/> <b>Adult Education &amp; Employment</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Job training</li><li><input type="checkbox"/> GED or ESL classes</li><li><input type="checkbox"/> Other _____</li></ul>
<input type="checkbox"/> <b>Home Visiting</b> <ul style="list-style-type: none"><li><input type="checkbox"/> PAT</li><li><input type="checkbox"/> Nurse Family Partnerships</li><li><input type="checkbox"/> Healthy Start</li><li><input type="checkbox"/> Nurturing Parenting</li><li><input type="checkbox"/> Maternal Child Health</li><li><input type="checkbox"/> Other _____</li></ul>	<input type="checkbox"/> <b>Pregnancy</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Prenatal Care</li><li><input type="checkbox"/> Prenatal/Postpartum Mental Health</li><li><input type="checkbox"/> Other _____</li></ul>	<input type="checkbox"/> <b>Other (please describe)</b> _____ _____ _____ _____

Outcome of Referral (to be completed by FC Staff) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ Date: \_\_\_\_\_

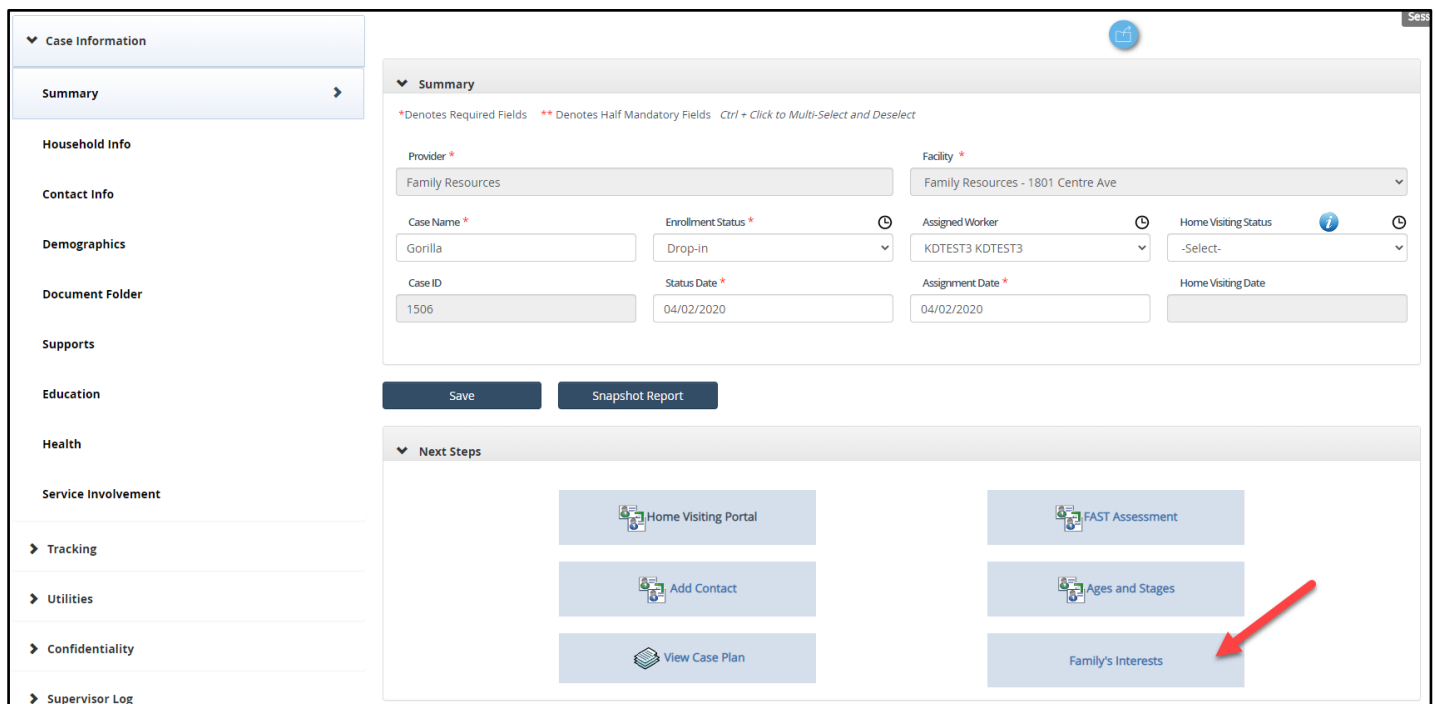


# Family Interest Survey Guidance

We want new families to know all that Family Centers have to offer! After the family decides to become enrolled or drop-in status at the center, you can ask them to complete the Family Interest Survey, or you can include the survey in the Welcome Bag. This will ensure the family is aware of other services you can offer, and it will help center staff know how to best support the family. The survey is located on [pg. 15](#) of this guide.

### FAMILY INTEREST SURVEY:

Enter the case where a Family Interest Survey Form has been completed. Click on the Family Interests box in the Next Steps section of the Summary screen.



The screenshot shows the 'Summary' screen for a case. On the left is a sidebar with navigation options: Case Information, Summary (selected), Household Info, Contact Info, Demographics, Document Folder, Supports, Education, Health, Service Involvement, Tracking, Utilities, Confidentiality, and Supervisor Log. The main content area is titled 'Summary' and includes a legend: '\* Denotes Required Fields', '\*\* Denotes Half Mandatory Fields', and 'Ctrl + Click to Multi-Select and Deselect'. Below this are several input fields: Provider (Family Resources), Facility (Family Resources - 1801 Centre Ave), Case Name (Gorilla), Enrollment Status (Drop-in), Assigned Worker (KDTEST3 KDTEST3), Home Visiting Status (-Select-), Case ID (1506), Status Date (04/02/2020), Assignment Date (04/02/2020), and Home Visiting Date. There are 'Save' and 'Snapshot Report' buttons. Below the Summary section is the 'Next Steps' section, which contains a grid of buttons: Home Visiting Portal, FAST Assessment, Add Contact, Ages and Stages, View Case Plan, and Family's Interests. A red arrow points to the 'Family's Interests' button.

Select the checkboxes of the Family's Interests from the dropdown. Select as many as apply and click Save.

You can also update this list if Family's Interests are already selected. Unselect the checkboxes of the Family's Interests that do not apply and select the checkboxes of the ones that do. Click Save.

**Family's Interests**

Which services are the family most interested in? \*

None selected

- ☐ After School programs
- ☐ Assessment of baby's growth
- ☐ Authorized to Share Info with Referral Source
- ☐ Child behavior support
- ☐ Child Programs/Services
- ☐ Clothing
- ☐ Critical Case
- ☐ D&A
- ☐ Desire to meet other parents
- ☐ Early Intervention Program Info Provided
- ☐ Early Intervention Tracking Eligible
- ☐ Education on child development

For the Interests, select the appropriate match in the Family's Interest dropdown. Some selections from the form do not have an exact match.

☐ **Basics** 1

- ☐ Food
- ☐ Housing and rental assistance
- ☐ Diapers, formula, and other baby items
- ☐ Transportation
- ☐ Clothing
- ☐ Help with utilities
- ☐ Budgeting and help with finances

☐ **Physical & Mental Health (CHILDREN)**

- ☐ Immunization clinics
- ☐ Dental clinics
- ☐ Primary care
- ☐ Specialty care
- ☐ Mental health, behavior, or safety supports
- ☐ Child development & milestones
- ☐ Special Education 3

☐ **Parenting** 4

- ☐ Home visiting (one-on-one support)
- ☐ Group parenting classes
- ☐ Fatherhood programs
- ☐ Grandparent programs
- ☐ Activities for new moms

☐ **Adult Education & Employment** 6

- ☐ GED classes
- ☐ ESL classes
- ☐ Finding a job or career counseling
- ☐ Career and certification training
- ☐ Continuing education

☐ **Benefits** 2

- ☐ WIC
- ☐ SNAP (food assistance)
- ☐ TANF (cash assistance)
- ☐ Health Insurance
- ☐ Child Care Works (formerly CCIS)
- ☐ Energy Assistance
- ☐ Long Term Care services

☐ **Physical & Mental Health (ADULTS)**

- ☐ Primary care
- ☐ Specialty care (including women's health and prenatal)
- ☐ Mental health, emotional, or safety supports
- ☐ Substance abuse 3

☐ **Childcare & Learning Support** 5

- ☐ Infant or toddler activities
- ☐ Preschool-age activities
- ☐ Early Head Start, Head Start, Pre-K Counts, or childcare
- ☐ After-school programs or summer camps
- ☐ Library services
- ☐ Behavior support, developmental support, or Special Education

☐ **Social Activities** 7

- ☐ Family Fun Nights
- ☐ Story times
- ☐ Craftmaking
- ☐ Cooking classes
- ☐ Fitness & wellness activities
- ☐ Parent and caregiver social activities

- ☐ After School programs 5
- ☐ Assessment of baby's growth 3
- ☐ Authorized to Share Info with Referral Source
- ☐ Child behavior support 5
- ☐ Child Programs/Services 5
- ☐ Clothing 1
- ☐ Critical Case
- ☐ D&A 3
- ☐ Desire to meet other parents 7
- ☐ Early Intervention Program Info Provided 5
- ☐ Early Intervention Tracking Eligible 5
- ☐ Education on child development 3
- ☐ Emotional Support 3
- ☐ Employment 6
- ☐ Family Literacy/Even Start 6
- ☐ Financial/Employment/Education goals 6
- ☐ Follow-Up Form
- ☐ Food 1
- ☐ Health Care Information/assistance 2
- ☐ Help in accessing resources
- ☐ Home management/life skills training 7
- ☐ Homeless Resources 1
- ☐ Housing 1
- ☐ Mental Health 3
- ☐ Personal safety
- ☐ Prenatal support and education 4
- ☐ Recreational/Social Activities 7
- ☐ Referral for child care 2
- ☐ Summer Camp programs 5
- ☐ Supervised visitation 4
- ☐ Support with bonding 5
- ☐ Transportation 1
- ☐ Utilities 1