Need Identified

*Not Associated with the Family Goal*
*In the Family Services’ Events tab, click on the green “Add Event” button on the right side of the screen.
*Scroll down the drop down menu to “Need Identified” and click...UNLESS it is a crisis or emergency situation.
*This screen will appear.

*Enter the date the need was identified.

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*Click on the Service Area box to view the drop down menu.
*Choose the service area that best fits the need you are entering.
*Click on that service area within the drop down menu.
*Click on the Issue box to view the drop down menu.
*Choose the issue that best fits the family’s need.
*Click on that issue within the drop down menu.
*The Associated With box will automatically populate “Entire Family”.
*You do have the option to change it to an individual enrollee within the family, if you need.
*In that case, you would choose the enrollee’s name in the drop down menu.
*Click on the Case Worker box.
*Either scroll down or begin typing your last name.
*Once you find your name, click on it.
*In the Family Members box, type which adult(s) you are working with in regards to this identified need.
*Click in the Progress box.

*Choose “In Progress” from the drop down menu, and click on it.
*Leave the Date Closed box blank until all actions have a final status entered.

*Once that is complete, enter the closed date and update the status.
Click the green “Add Action” button.

Each referral, task, communication, follow up, or direct service in regards to this need identified will be entered as its own individual Action.

You may have multiple Actions listed for one need.
Communication: a conversation or communication in person, over the phone, through text, email, or flyer

Direct: an action to be completed by Head Start

Family Task: an action to be completed by the family

Referral: a referral was given to the family

*This screen will appear.
*From the Action Type drop down menu, choose the most appropriate action type for your entry.
*Depending on the Action Type you choose, more boxes may appear.
*Enter the Scheduled Date as the date you expect the action to be completed by.

*Enter the Action Date as the date you initiated the process for this specific communication, direct service, family task, or referral.
*Click on the Referred To box.
*Either scroll down or begin typing the agency or name the referral is for.
*Once you find the name, click on it.

*Click the Referral Type box.
*Use the drop down menu to click on how the referral was given to the family, Verbal or Written.

*If the action is a referral, there will be two extra boxes to fill out:
  - Referred To
  - Referral Type.

*If you are not entering a referral, skip to the next slide on Type of Contact.
*Click on the Type of Contact box.

*Choose from the drop down menu what type of contact you had with the family regarding this action.
*Type a brief description of the action.
*Use the drop down menu to choose “In Progress” until you know the final outcome of the action.

*Once you know the final outcome, update the status.
*Click on the Case Worker box.

*Either scroll down or begin typing your last name.

*Once you find your name, click on it.
*In Action Notes, click the date and user stamp that looks like a clock.

*Type any notes to document actions and follow up.

*Click spell check and update any spelling errors.

*Click the green “Save” button.

*Return to this page to update notes and status as needed.
*You will return to the Need Identified screen with the Actions box filled in.

*Click the green “Add Action” button for an additional action to this need identified, and follow the process you just completed.

*Once all actions are entered, click the green “Save” button at the bottom of the page.
*Once all actions have a final status entered, update the progress of the emergency/crisis and the date.

*Click the green “Save” button at the bottom of the page.
*Referrals completed in Family Services need attention within the “Family Services Information” tab.

*Review the PIR training on Needs Identified for the next steps.
Questions?

Contact your supervisor for additional guidance.