



# RECOMMENDATIONS FOR COMPLETING A VIRTUAL HOME VISIT

*When it is not possible to complete Family Spirit home visits in-person, participants may complete lessons and assessments virtually (by phone or video chat) and, if applicable, receive their incentive(s) for doing so. The below recommendations from Family Spirit apply to programs with permission from their organization to conduct virtual home visits. **Program-specific policies and evaluation procedures should be adhered to before considering the below guidance.***

## **Maintaining Confidentiality and Protecting Personal Health Information:**

Conducting virtual home visits requires some extra care to ensure that the **participant's privacy and confidentiality** is respected. It can be challenging to get a full understanding of the context and circumstance of the visit when you are not in-person with the participant. Thus, before providing recommendations for how to do virtual home visits, here are some guidelines for maintaining confidentiality:

### Before the visit:

- When scheduling the visit, ask the participant to find a private space to complete the visit.
- Let the participant know where you plan to be located when you do the visit (for example, your office or an alternate location).
- If possible, give the participant a heads up about what you plan to ask/discuss during the visit.
- Encourage the participant to wear headphones, if available, to help with privacy.

### During the visit:

- Double check that the participant is in a place where they feel comfortable talking.
- Ask who is present with the participant at the visit.
- Confirm that you are also taking the call from a private space.
- Take care not to bring up sensitive subjects or confidential information that the participant has previously shared.

Best practices should be followed to protect personal health information and participant identifiers. If files are taken out of the office, laptops/tablets must be password protected. A lockbox, locking briefcase or locking cabinet can also be used to store information outside of the office.

## **Recommendations: Completing a Phone or Video Chat LESSON with the Client**

All affiliate sites have access to the electronic files for Family Spirit lessons and other curriculum materials through FS Connect. Before a virtual lesson visit, the participant needs access to either hard copies or electronic copies of the lesson, activity pages, and handouts so that they can follow along with the lesson content. You may use the files from FS Connect to print and mail copies or share electronic files of the lesson materials with participants:

- Home visitors can either mail a packet of curriculum lessons with activity pages and handouts, or mail just activity and handouts (to save on paper and postage). Then the home visitor can schedule phone or video chat conversations with the participant to review planned lesson(s).
- If mailing the lesson is not logistically feasible, lessons with activity pages and handouts may be shared electronically with the participant. The means of electronic sharing will vary due to the participant's internet or phone capabilities. For example, the materials could be shared via email or an

electronic shared folder. In some cases, texting photographs of the relevant pages might be the best option. If conducting the visit through video chat, the lesson pages can also be shown on the screen. *The Family Spirit team is exploring various options for sharing lessons electronically, and welcomes feedback from affiliates on what works best in community settings.*

If your program has any standard interview data collection items to be collected during a lesson visit, be sure to also go through those during the virtual lesson visit prior to ending the call/video chat. It is very important to document how the lesson was administered: in-person, by phone, or by video chat. A data field should be included to track this information.

**What Counts as a Virtual Lesson Visit?** Refer to your organization and/or funder's policies for specific considerations around virtual home visits.

- 1) Visits should be a *minimum* of 15 – 20 minutes. Follow the home visit structure to the best of your ability.
- 2) Social support visits are expected to increase during this time; however, effort should be made to include relevant lesson content.
  - a. A *lesson visit* must include content from the Family Spirit curriculum. Focus on the teaching points from the lesson pages, and expand as time allows. Utilization of the various curriculum tools (i.e. the VISION or SPIRIT worksheets) are helpful for goal setting and problem solving).
  - b. If you do not get through all teaching points during a lesson visit, plan to finish that lesson at the next virtual visit.
  - c. Visits that do not cover Family Spirit lessons are *social support visits*.
- 3) Ask about needed referrals and provide community resources.
- 4) Document the contact with date, time, length of visit, type of contact and material covered. If electronic systems are not accessible remotely, this documentation can be done via paper and transcribed into electronic systems when returning to the office.
  - a. Family Spirit provides the Session Summary Form for documentation of the visit. This can be used in print or completed and saved electronically.

### **Recommendations: Mailing SELF-REPORT ASSESSMENTS to Participants**

*Note: If your evaluation team approves of administering self-report assessments via mail, the following are recommendations for doing so, based on Family Spirit research trial procedures.*

The paper copies of self-report forms may be mailed to the participant at the most recent address you have on file for them. Within the package, include an additional manila envelope addressed with your office<sup>1</sup> address and with required stamps on the envelope so that the participant can send the assessment back.

- 1) Ensure you have the participant's correct mailing address.
- 2) In a large envelope, enclose the correct self-report forms for the timepoint (please note – depending on which data collection and management system your program uses, e.g. Care4, you may be able to email a link to self-report forms to participants with this capability).
  - a. Cover letter describing why you are mailing the assessment and what needs to happen for them to get their gift card<sup>2</sup>
  - b. Empty stamped manila envelope with your office address on it
- 3) If your program provides incentives to participants for completing assessments, we recommend that the participant must complete and mail back (or submit via your data collection and management system) all self-report forms prior to receiving their incentive.
- 4) If program participants move often, call prior to mailing to confirm the participant's address. During this phone call, you can also ensure they know that in order to receive their incentive, they must 1) complete all documents in the envelope and 2) mail the documents back to your office.
  - a. If you are certain of the participant's current mailing address, you can skip this step.

<sup>1</sup> COVID-19-specific note: If you are working from home, you will have to enter data once you are able to return to work.

<sup>2</sup> COVID-19-specific note: If you are working from home, be sure to clarify in the cover letter that you will not be able to send gift cards from completed assessments until you are permitted to return to the office.

Document that the self-report forms were completed by mail. A data field should be included to track this information.

If mailing of self-reports is not logistically feasible, a last resort option is to ask self-report questions over phone or video as an interview. Again, it is important to document how the questions were administered.

### **Recommendations: Completing a Phone or Video Chat INTERVIEW ASSESSMENT with the Participant**

*Note: If your evaluation team approves of administering interview assessments via phone, the following are recommendations for doing so, based on Family Spirit research trial procedures.*

Interview assessments may be completed via a phone or video chat interview before or after self-report materials are completed and returned.

- 1) Set up a phone or video chat appointment with the participant.
- 2) Ensure you have all necessary forms in front of you during the interview call/video chat (this may mean paper forms or a tablet/laptop logged into your program's data collection and management system) while on the phone or video chat.
- 3) Complete the interview with the participant.
- 4) Thank the participant for their time, explain how they will be receiving their incentive for completing the assessment (if applicable), and make an appointment for your next visit (if applicable).
- 5) Ensure all data are properly entered into the participant's record.

Be sure to document that the interview was completed by phone or video. A data field should be included to track this information.

### **Recommendations: Recording Data**

Once all paper forms are complete and sent to your office, they should be entered into the data management system.

- 1) Enter data exactly how it appears on paper forms. If a question is left blank, leave it blank during data entry (unless there is a refuse to answer button for that question).
- 2) Be sure to document that the assessment was done via phone, video, and/or mail.

### **Recommendations: Sending the Participant Their Incentive**

Home visitors may send the participant the appropriate incentive only after they confirmed the participant completed the assessment. If a participant does not complete the assessment, they should not receive their incentive until they complete it. Follow the procedure in logging the gift card as you normally would for your program. You can either mail a gift card or send an e-gift card if the participant has an email address. **Please adhere to your program's policies related to e-gift cards; they may not be permissible.**

### **Shipping Gift Cards**

- 1) Confirm the participant's address.
- 2) Ship the gift card in a white business envelope or small box (FedEx or US Postal Service). Write the program office's return address on the envelope/box.
- 3) One week after shipping, call to confirm the participant received the incentive. If they did not, tell the supervisor who will help to determine next steps.

### **Emailing Gift Cards**

- 1) Confirm the participant's email address.<sup>3</sup>
- 2) Follow program procedures for emailing the gift card.
- 3) One week after emailing, call to confirm the participant received the incentive. If they did not, tell the supervisor who will help to determine next steps.

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<sup>3</sup> COVID-19-specific note: If you are working from home, it is recommended that you be sure to ask participants for their email address during any virtual assessment visits. This way, you can email gift cards if they are interested in receiving them that way. Be sure to adhere to program policies around emailing gift cards.