

Family Goals

This is where we can show information about the family goal. Actions, such as direct services or referrals, related to the family will be recorded in the “Add Action” section.

To Add Family Goal:

1. Click Services tab
2. Select the child
3. Click on the Family Services tab
4. Click “Add Event”
5. Click “Family Goal”
6. Complete the tabs as follows
 - **Initial Date:** when service took place
 - **Description:** Enter the family goal
 - **Service Area:** Social Service
 - **Issue:** drop-down list of identified needs (these match PIR categories)
 - **Source of Information:** Family Partnership
 - **Family Outcome:** choose one (PFCE)
 - **Associated With:** this will be auto-filled
 - **Case Worker:** start typing your last name, select your name
 - **Family Members:** leave blank
 - **Closure Expected:** one month from the initial date and every 30 days thereafter. Clear field once completed.
 - **Progress:** choose from *In Progress, Completed or Canceled*
 - **Date Closed:** enter the date Family Goal is completed or canceled, then clear the “closure expected” date
 - **Result:** leave blank
 - **Event Notes:** timestamp and provides steps expected to complete the FG
7. Click save

If the Family Goal is not completed within 3 months of enrollment or within 3 months of ending a prior goal:

1. Click Services tab
2. Select the children
3. Click on the Family Services tab
4. Click “Add Event”
5. Click “Need Identified”
 - **Initial Date:** Date 3 months after enrollment
 - **Description:** “Family goal delayed with reason” - input details in the notes section
 - **Progress:** In progress
 - Add follow-up under **Add Action** each month with goal progress until the goal is set
6. Once the goal is set:
 - **Progress:** Completed
 - **Date:** Date the goal was set
 - Follow the process above to document the goal that was set – this will be a new event

★ ***If a family chooses not to set a goal, conversations surrounding family accomplishments will be documented under this need identified***

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To Add Follow up, make referrals, or provide direct services related to the Family Goal

1. Click Services tab
2. Select the child from
3. Click on the Family Services tab
4. Locate and select the Family Goal you want to follow up on
5. Click “Add Action”
 - **Action Type**- select direct, referral or follow-up (what role did EHS play in this action?)
 - **Direct:** Head Start performed the action
 - **Referral:** a referral was provided (referral is not complete until the need is met or canceled)
 - **Follow up:** update on the overall goal
- ★ If you selected “Referral” from the Action Type list, two new fields will open underneath. You can leave those fields BLANK.
 - **Action Date:** fill in with date action was taken
 - **Type of Contact:** choose the most appropriate option
 - **Description:** of the direct service provided or where the family was referred
 - **Status:** is the result of the progress of this action- Action Completed, Ongoing or Canceled
 - **Case Worker:** drop-down list of names
 - **Total Time:** leave blank
6. **Action Notes:** timestamp entries. Use this area as a running log to provide any additional details and/or ongoing information related to the status of a referral.
7. Click Save