Personal Visit 101: Review, Consult and Check-In

Every personal visit begins with planning, and the more intentional and organized that process becomes the more your visits will meet the individual needs of your families. Below are some helpful tips to make the best of your time and resources during your visits with families.

Step 1: first things first
Consider creating a checklist to use each time you sit down to plan a personal visit to expedite your planning. Your list could include the following:

- Gather your materials in a convenient location, such as close to a computer, laptop or tablet.
- Suggested materials include:
  - Your family files
  - A supply of *Foundational Visit Plans* and *Personal Visit Planning Guides*
  - Screening protocols, toolkit cards and resource guide
  - Program newsletters, group connection and screening information, other program forms

- Suggestions from the field include:
  - A copy of the online table of contents to quickly choose *Activity Pages*, *Parent Educator Resources* and *Parent Handouts.*
  - A copy of the *Developmental Topics Chart* for quick reference in planning the Development-Centered Parenting area of emphasis.

Step 2: review
A review of existing family records will start the planning process for your next visit.

For a family new to your program, the only information you might have is an enrollment form, so additional information might need to be gathered during the check-in. If the family has been receiving visits, the review will involve looking over previous planning guides, visit records, milestone forms, possibly a goal tracking sheet, health record, and screening results or completed assessments.

As you look over these documents take note of skills and behaviors that have not yet been observed, what is marked as the next steps in goal setting, screenings that need to take place and family events to connect around.

Step 3: consult
As a result of the review process, you might find the need to consult with someone else to provide answers to your questions or provide additional professional resources that would strengthen your ability to meet the needs of the family.

This consultation could be with your supervisor, a mental health professional or early interventionist. Even a peer mentor can help you work through the next steps. Maintaining confidentiality is, of course, critically important when discussing a family with a peer.

Step 3: check-in
For the family new to personal visits, best practice calls for two check-ins.

The first should be "live" if at all possible. This first check-in gives you the opportunity to answer questions, share information about the program and describe what takes place on a personal visit. It is also a check-point to make sure the family information is correct, such as names, address, child's birthday, etc.

The check-in to confirm the date and time of the visit will occur based on your program's directives, but is usually the day before or the morning of the visit. It is recommended using the method of check-in established with the family (i.e., phone call, email, text message).

Confirming your appointment shows respect for the family's time and can reduce frustration of "no-shows." The check-in is also an opportunity to confirm the agenda, ask if there is an additional topic the family would like to address and builds anticipation for the visit.

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