

INSTRUCTIONS GUIDE

The **COVID-19 Visiting Record** in the Operations Database (ODB) was updated on December 15, 2020. The form is to be used for planning, approving, and documenting visits during the COVID-19 pandemic. **All locations are required to document visits in the ODB using this Visiting Record.** If the ODB is down, complete this checklist on paper or in the electronic MS Word form and then update the ODB when it is live.

The Visiting Record has four forms in one record. Each form has its own purpose and is used based on the following type of visits:

1. Designated Visit (at Christian Horizons Support Locations)

- For **designated visits** at Christian Horizons support locations, this record is to be completed and approved **ONCE** in advance of the first visit.
- Documentation of visits is to be recorded in Support Notes.
- Active screening for every visit will continue to be tracked on the [Screening Tracking Form](#).
- If and when there is a change in **designated visitors**, complete a new Visiting Record to document the change.

RECOMMENDATION

Keep a current list of designated and essential visitors posted somewhere visible in the support location so employees are all aware if and when there are changes to these types of visitors.

2. Essential Re-Occurring Visit (at Christian Horizons Support Locations)

- For **essential re-occurring visits** at Christian Horizons support locations, this record is to be completed and approved **ONCE** in advance of the first visit.
- Documentation of subsequent visits is to be recorded in Support Notes.
- Active screening for every visit will continue to be tracked on the [Screening Tracking Form](#).
- If and when there is a change in **essential visitors**, complete a new Visiting Record to document the change.

3. Essential Overnight Visit (at Family or Friend's Home)

- This record is to be completed for **EVERY essential overnight visit** occurring outside of the Christian Horizons support location.

4. Non-Essential Family & Friend or One-Time Essential Visit (at Christian Horizons Support Locations)

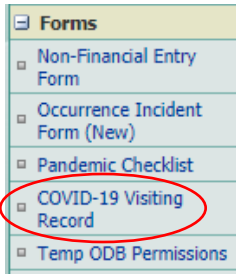
- This record is to be completed for **EVERY non-essential family and friend visit or for essential visits** that occur **one-time** (not re-occurring) at Christian Horizons support locations.

Please refer to the [COVID-19 Visiting Guide for Locations](#) for visitor definitions, visit guidelines, etc.

INSTRUCTIONS ON USE IN THE ODB

Creating a New COVID-19 Visiting Record

- 1) Click on the **Services** tab and select the support location that you are completing the Visiting Record for.
- 2) Click **COVID-19 Visiting Record** in the left-hand navigation menu under **Forms** for the support location you selected.



- 3) This will take you to the Summary Page. The Summary page provides an overview of visit information where you can VIEW or EDIT the visit. See **Editing or Viewing a Visiting Record** on page 4 for more details.

+ Add New COVID-19 Visiting Record				
Modify Form	Date of Visit	Type Of Visit	Name of Person Supported	Name of Family/Friend (Visitors)
View	12/25/2020 10:00 AM	NON-ESSENTIAL FAMILY/FRIEND OR ONE-TIME ESSENTIAL VISIT	America, Captain	Hulk, Spiderman
View	12/25/2020 12:00 AM	DESIGNATED VISIT	Parker, Peter Spiderman	Santa Claus
View	12/17/2020 8:00 AM	NON-ESSENTIAL FAMILY/FRIEND OR ONE-TIME ESSENTIAL VISIT	America, Captain	Bob Smith

- 4) Click **Add New COVID-19 Visiting Record** to add a new Visiting Record.



You will be taken to the **COVID-19 Visiting Record** screen.

COVID-19 VISITING RECORD

December 15, 2020 Update

The [COVID-19 Visiting Record](#) provides direction on required documentation for Designated Visitors, Essential, Non-Essential, and Essential Overnight Visits. It is used for planning, approving, and documenting visits during COVID-19. Please refer to the [COVID-19 Visiting Guide for Locations](#) for visitor definitions, visit guidelines, etc. All Ontario locations are required to document visits in ODB using this Visiting Record.

Recently, we made the following improvements to the **COVID-19 Visiting Record** in the ODB:

- The form has been streamlined into 3 main sections (Identifying Information, Visit Details, and Employee Sign Off and Supervisor Approval)
- Additional fields have been added to the Summary Page (e.g., Date of Visit, Name of Visitors)
- A locked field for Manager only Sign Off

Please click [here](#) for an updated Instructions Guide for help on how to complete the Visiting Record. A [Word version](#) of the Visiting Record is available to be used when the ODB is down. Please transfer all information to the ODB once it is back up and running.

Note: Visits in the community (e.g., in parks, at restaurants, at the malls, a short day visit to a family member's home, etc.) are tracked in Support Notes, not on the Visiting Record form. If people using services go into the community, teams can help support or encourage them to track who they have been in contact with and where they have gone using the [Where I've been Timeline](#) tracker. The tracker will help people who use our services to retrace their steps and track their contact with others, in the event they feel sick or develop symptoms.

Completing a COVID-19 Visiting Record

The Visiting Record consists of three main sections:

1. Identifying Information section

This section identifies the location, person being visited (if applicable), date and time of visit, name of family/friend (visitors), and other identifying information for the visit. Please note the following as you fill in the identifying information:

- a) The **Service Location** field populates automatically. All other fields are entered manually.
- b) The **Name of Person Supported** field allows you to select the name of the person at the service location you are filling in the record for. **This field is required with one exception:**

For an Essential Visit that is tied to a service location and NOT a person using services (a repair/maintenance of the home, etc.), the **Name of Person Supported** field can be left blank. Otherwise, this field is required for all other visits.

IDENTIFYING INFORMATION - Fill This out First

Service Location

Test Program

Name of Person using Services:

(None)

Date and Start Time of Visit:

12 AM | 00

Date and End Time of Visit

12 AM | 00

Name of Family/Friend (Visitors):
(Enter multiple visitors in same space, separated by comma)

Relationship to Person Supported:

Contact Information of Family/Friend (Visitors)

2. Visit Details section

VISIT DETAILS - Select Type of Visit to continue

PLEASE SELECT TYPE OF VISIT FROM THE BELOW LIST

Note: See description below to ensure the right type is selected as each record collects different data. Wrong selection will result in a re-completion of the record. For visitor definitions, please review the [COVID-19 Visiting Guide for Locations](#)

NO OPTION SELECTED
 DESIGNATED VISIT
 ESSENTIAL RE-OCCURRING VISIT
 ESSENTIAL OVERNIGHT VISIT
 NON-ESSENTIAL FAMILY/FRIEND OR ONE-TIME ESSENTIAL VISIT

DESIGNATED VISIT
 For designated visits at **Christian Horizons support locations**, this record is to be completed and approved ONCE in advance of the first visit. Documentation of subsequent visits is to be recorded in Support Notes. Active screening for every visit will continue to be tracked on the [Screening Tracking Form](#). If and when there is a change in designated visitors, complete a new Visiting Record to document the change.


ESSENTIAL RE-OCCURRING VISIT
 For essential re-occurring visits at **Christian Horizons support locations**, this record is to be completed and approved ONCE in advance of the first visit. Documentation of subsequent visits is to be recorded in Support Notes. Active screening for every visit will continue to be tracked on the [Screening Tracking Form](#). If and when there is a change in essential visitors, complete a new Visiting Record to document the change

ESSENTIAL OVERNIGHT VISIT
 To be completed for **EVERY essential overnight visit** occurring **outside of Christian Horizons support locations**.

NON-ESSENTIAL FAMILY/FRIEND OR ONE-TIME ESSENTIAL VISIT
 To be completed for **EVERY non-essential family and friend visit or for essential visits** that occur one-time (not re-occurring) **at Christian Horizons support locations**.



- a) Select the type of visit that is required for the particular Visiting Record from the list provided. Read the description below the list as a guide for selecting the appropriate type of visit. The form you select will pop up on the screen in the same window and is ready to fill in.
- b) Click **Cancel** if you selected the wrong type of visit.
- c) Click the **Save** button at the bottom of the form once you have created or completed the Visiting Record. When the record is saved, you will be taken to the summary page that lists all Visiting Records for the selected location.

3. Employee Sign Off and Supervisor Approval section

EMPLOYEE SIGN OFF AND SUPERVISOR APPROVAL	
FOR EMPLOYEE	
Name of Attending Employee(s)	
Enter users separated with semicolons.  	
<input type="checkbox"/>	Visit Cancelled <i>(Clicking this checkbox means the visit was cancelled after initial planning)</i>
<input type="checkbox"/>	Visit and Visiting Record Completed? <i>(Clicking this checkbox means the visit and record is now complete and ready for Manager's review/approval)</i>
Name of Employee Completing the Record (Pre-Visit)	
Enter users separated with semicolons.  	
Date Record Completed (Pre-Visit)	
<input type="text"/>	
Name of Employee Completing the Record (Post-Visit)	
<input type="text"/>	
Date Record Completed (Post-Visit)	
<input type="text"/>	
FOR MANAGER	
<input type="checkbox"/>	Delete Visiting Record? <i>(Clicking this checkbox means the record was entered incorrectly or twice and can be removed from the ODB)</i>
<input type="checkbox"/>	Manager confirms that they have reviewed and approved the visit and content of the Visiting Record.
Name of Manager Reviewing/Approving	
<input type="text"/>	
Date Reviewed/Approved	
<input type="text"/>	

When the Visiting Record is complete and ready for supervisor’s review and approval, fill out the **Employee Sign Off and Supervisor Approval** section. There are two sub-sections:

a) For Employee sub-section

- Fill out the **Name of Employee(s) Supporting the Visit**, you can add multiple employees   using the employee selection tool (the same way you would select employees in an Occurrence Incident report).
- Check the **Visit Cancelled?** checkbox if the visit was cancelled after initial planning.
- Check the **Visit and Visiting Record Completed?** checkbox if the visit and record is complete and ready for supervisor’s review and sign off.
- Complete the **Name of Employee Completing the Record (Pre-Visit)** and **Date Record Completed (Pre- Visit)** after you have entered pre-planning visit information for supervisor’s review and approval of visit.
- Only complete the **Name of Employee Completing the Record** and **Date Record Completed** fields when the record is final and ready for supervisor’s review and approval.

If you need to go back to enter “during visit” and “post visit” information, leave **Name of Employee Completing the Record (Post-Visit)** and **Date Record Completed (Post-Visit)** fields blank until all other components of the Visiting Record have been filled in and completed.

b) For Manager sub-section

- Check the **Delete Visiting Record?** checkbox if the Visiting Record was entered incorrectly or entered twice and can be removed from the ODB.
- Check the second checkbox to confirm that the **manager has reviewed and approved the visit and the content of the Visiting Record** before signing off and dating the record.
- **Name of Manager Reviewing/Approving** field is locked for manager sign off only.

Editing or Viewing a Visiting Record

Once a Visiting Record has been created or completed, you can **View** or **Edit** the record.




The **Summary Page** has important details on what record has been filled out.

+ Add New COVID-19 Visiting Record				
Modify Form	Date of Visit	Type Of Visit	Name of Person Supported	Name of Family/Friend (Visitors)
View	12/25/2020 10:00 AM	NON-ESSENTIAL FAMILY/FRIEND OR ONE-TIME ESSENTIAL VISIT	America, Captain	Hulk, Spiderman
View	12/25/2020 12:00 AM	DESIGNATED VISIT	Parker, Peter Spiderman	Santa Claus
View	12/17/2020 8:00 AM	NON-ESSENTIAL FAMILY/FRIEND OR ONE-TIME ESSENTIAL VISIT	America, Captain	Bob Smith

- (1) **Date of Visit:** The date that the visit occurred
- (2) **Type of Visit:** This is the type of visit that the record was completed for
- (3) **Name of Person Supported:** IF APPLICABLE – this shows the person using services who the record was filled out for (i.e., who the visit was tailored to)
- (4) **Name of Family/Friend (Visitors):** The person or company that visited the support location or person using services
- (5) **Name of Employee Completing the Form (Post-Visit):** The name of the employee who completes the Visiting Record after the visit.
- (6) **Date Record Completed (Post-Visit):** The date the record was completed by employee after the visit.
- (7) **Name of Manager Reviewing/Approving:** The name of manager who confirms that they have reviewed and approved the visit and the content of the Visiting Record.
- (8) **Date Record Reviewed/Approved:** Date record reviewed and approved by manager.
- (9) **Visit Cancelled?:** This is marked if the visitor record was filled out, but the visit was cancelled
- (10) **Visit and Visiting Record Completed?:** If the checklist is complete, this will be marked YES, if not, NO will be in this column
- (11) **Delete Visiting Record?:** Marks the record to be removed from the ODB

You can view the record selected after looking at the Summary Page by:

- 1) Finding the Visiting Record you would like to **View** or **Edit**.
- 2) Clicking on the **View** button, or the drop-down arrow, then selecting **View** or **Edit**.

Title	StartTime	Created By
 View	8/20/2020 3:30 AM	Alex Morris
 View	8/19/2020 11:30 PM	Alex Morris
 Edit	5/16/2012 1:30 AM	Alex Morris

If you are editing the record, don't forget to click **Save** to save your changes once you are done editing.

Notifications for Supervisors

Supervisors will receive automatic notifications based on the following scenarios:

- 1) Scenario 1: A Visiting Record has been created but not completed – once **Date Record Completed (Pre-Visit)** field has been entered.
- 2) Scenario 2: A Visiting Record has been created and completed – once **Date Record Completed (Post-Visit)** field has been entered.

Report

A summary report of all Visiting Records is available to Supervisors, Area Managers, and Systems Managers for a quick review and follow up actions on incomplete records. It can be found on the left-hand navigation menu under Forms after selecting the support location under Services tab.

Former Visiting Record Format

To edit, view, or approve Visiting Records entered in the ODB between **October 13, 2020 and December 14, 2020**, click on the **COVID-19 Visiting Record(old)** link in the left-hand navigation menu under **Forms** for the support location you selected. This will take you to the appropriate page in which you can access old Visiting Records.

