

# Enrollment and Consent in Virtual Visits: Considerations for Models and Programs

Across home visiting models, there are core elements to enrolling families into a program. If you have been able to enroll a new family during this time of physical distancing, you have probably found new ways to accomplish these elements. The following are some considerations for the enrollment process.

## Recruitment and Referral Considerations

Review of the current Policy & Procedures can help programs decide what changes and additions may be needed.

- What does the recruitment process look like now?
    - Who is responsible for recruitment?
    - Have the electronic “brochures” related to recruitment been updated to reflect changes to service delivery?
      - What does a virtual visit look like for the family?
        - Consider including a video of a visit
        - Family testimonials
        - Parenting resources
        - Photos and bios of the visitors
      - Website, social media
    - Do you need to describe this way of receiving experiences as temporary?
      - Will families transition to on-ground?
- How are community partners being updated?
  - Have your program’s enrollment procedures changed or been temporarily suspended?
  - What’s changed in the referral process? (different procedures or contact persons)
  - How frequently are contacts made with community partners?
  - What’s changed in your community partner’s process (different procedures or contact persons)?
  - Do any current Memorandums of Understanding/Agreement with community partners need to be revised/updated?
- Consider including referral information in every communication with community partners in signature line.



## Family Readiness

It is important to assess whether or not a family desires program services and has the level of tech knowledge and experience needed to be successful.

- Are there services for families that are interested but not yet ready?
  - Meet & Greet time prior to officially consenting
  - Virtual group meetings
- Are they comfortable with phone calls and texts to connect or share reminders between visits?
- Does family have access to Wi-Fi strength and speed to support a quality interactive video conference virtual visit? Or do they have access to a phone and adequate minutes or plan to allow for telephone visits?
- Does family have experience with email or document sharing to receive handouts?
- Does the family or family support professional require any additional supports due to a hearing, vision, or other physical impairment?

## Enrollment

Referral information can be used to establish rapport, the first step of therapeutic relationship, such as birthdate, address, due date, where client gets care, etc. All these are lead-ins to longer conversations that can allow the family support professionals to begin understanding the client's needs to tailor the program from the beginning. Review of the current Policy & Procedure can help programs decide what modifications may be needed.

- Do the enrollment documents need to be modified to include video/telephone visits?
  - Consent form or participation agreement
  - Program contact info
- Have any program services been changed or suspended?
  - If so, how will these changes be reflected in the enrollment materials?
- How will family support professionals access enrollment materials?
- Who initiates and introduces the enrollment process?
  - Intake coordinator, home visitor, assessment worker, etc.
- How will families access enrollment materials?
- How will documents be signed? As a reminder, the family support professional must discuss the document fully with the parent/guardian before asking for consent.
  - DocuSign electronic software
  - Email statement from parent giving consent
  - Texting a picture of the document for the parent to sign using their smartphone and then sending a picture back
- Where will signed electronic and hard documents be stored?
- Will documents be electronic only or will there be a hard copy?
- Does the program website need to be updated with current enrollment steps?
  - For either families and/or community partners
- What actions need to be completed for a family to be considered officially enrolled?



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