Remote Supervision Documentation

Anytime you are unable to complete your supervisory related responsibilities in your typical office space, there is need for planning and organization. We wanted to provide some helpful information to consider as you develop systems for virtual supervision.

It is important that you have access to the information you need to support staff and families, and that you protect confidential participant and staff information. **Supervision logs must never be removed from the office.** Instead, when taking family-focused and staff-focused notes, these notes should be recorded in a secure online location, like SharePoint or through Virtual Private Network (VPN).

Step one (platform and permissions): With prior authorization from your agency, create a folder structure (as depicted visually below). It will be important that management, with potential support of your IT department, provide access to only the staff requiring access to each folder (e.g. direct supervisor, coordinator).
Access should be tiered with:
- supervisor(s) having access to all home visitor folders
- coordinator having access to supervisor(s), and home visitor folders
- managers having access to home visitor(s), supervisor(s) and coordinator folders

Programs with more than one supervisor should give consideration to program supervisors having access to all home visitor folders should they provide interim coverage.

Step two (family-focused): Within each home visitor folder, create a folder for each participant where electronic family-focused notes can be saved. Name each file with participant name and date of the case review. Each completed file will be saved in the respective participant's folder. If possible, you would also have an electronic version of the Family Profile Plan(s) saved to each participant folder for reference and ongoing review of initial and ongoing family needs.

Step three (staff-focused): Within each home visitor folder, save completed staff-focused notes, identified with the staff's name and date of the supervision. This folder should also contain the weekly supervision and case review log(s) that capture both frequency and duration of supervision. Each home visitor folder will also include any shadow reports completed, QA call forms, and quality assurance tracking tools.

This system will allow you to store your files securely for easy remote access. The system will also allow you to organize your files for easy printing once you have returned to the office, or it will have created a way to transfer files to begin your own electronic supervision log.

- **Supervisor A**
  - **Home Visitor A**
    - Weekly Supervision/Case Review log
    - **Staff-focused**
      - Staff-focused notes (with dates)
      - Shadow report(s)*
      - Shadow tracking tool*
      - Quality Assurance Call Form*
    - **Family-focused**
      - **Family A**
        - Family-focused note (with participant name and date)
        - Family Profile Plan(s)*
      - **Family B**
        - Family-focused note (with participant name and date)
        - Family Profile Plan(s)*

*these items may be difficult to incorporate during the short-term

Please reach out to your Resource Specialist with any questions.