

Completing a Permanency Roundtable (PRT) Skills Case Summary Form



Knowledge Base Article

Completing a Permanency Roundtable Skills Case Summary Form

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Completing a Permanency Roundtable Skills Case Summary Form

Overview

The **Permanency Roundtable (PRT) Skills Case Summary Form** is a new form that has been added to SACWIS to help support **Permanency Roundtables**. Any user with access to the **Forms/Notices** link within the **Case** is able to generate the report.

The form has been divided by its three sections (A, B, and C) and is generated separately from the **Forms/Notices** section of each case. Each section pulls in data elements from the **Child's Case** and **Person Profile** record. In addition, some information will be entered by the user from the **Parameters** page, which is completed prior to generating, saving, and printing the forms.

The last section of this article includes a **Mapping Document** indicating from which area (Person, Case, Intake, etc.) and screen field each **Data Element** is pulled into the report. This mapping document is meant to assist the user in updating the child's information prior to generating the report.

To complete a **PRT Skills Case Summary Form**, complete following steps:

Navigating to the Forms/Notices Link

1. From the SACWIS **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click the **Case ID** link of the appropriate case.

Note: If you know the **Case ID** number, you can also use the **Search** link at the top of the **Home** screen to navigate to the **Case Overview** screen.

The screenshot shows the SACWIS interface. At the top, there is a navigation bar with tabs: Home, Intake, Case, Provider, Financial, and Administration. The 'Case' tab is selected and circled in red. Below this, there is a sub-navigation bar with 'Workload', 'Court Calendar', and 'Placement Requests'. The 'Workload' tab is also selected and circled in red. The main content area is titled 'Case Workload'. It includes a 'Caseworker' dropdown menu set to 'Socialworker, Susie' and a 'Sort By' dropdown set to 'Case Name Ascending'. Below this, there is a list of cases. The first case is highlighted with a blue background and has its Case ID, '1234567', circled in red. The case is marked as 'Open' and 'Ongoing'.

Completing a Permanency Roundtable Skills Case Summary Form

The **Case Overview** screen appears.

The screenshot shows the 'Case Overview' screen. On the left is a navigation menu with links: Case Overview, Activity Log, Attorney Communication, Intake List, Safety Assessment, **Forms/Notices** (circled in red), AR Pathway Switch, Safety Plan, Family Assessment, and Ongoing Case A/I. The main content area is titled 'Case Overview' and includes fields for Case ID, Case Name, Case Address, Case Status (Open), Case Category (Ongoing), Agency (ABC County Department of Job and Family Services), and Geo Code. Below these are 'Case Actions' with links: View Case Information, Linked Cases, and ProtectOhio Category.

4. From the **Navigation** menu, click the **Forms/Notices** link.

The **Maintain Forms/Notices** screen appears.

The screenshot shows the 'Maintain Forms/Notices' screen. The top navigation bar includes Home, Intake, Case, Provider, Financial, and Administration. Below this is a sub-navigation bar with Workload, Court Calendar, and Placement Requests. The left navigation menu has 'Forms/Notices' highlighted. The main content area is titled 'Maintain Forms/Notices' and includes fields for Case ID, Case Name, Case Status (Open), and Case Category (Ongoing). Below these is a 'Forms/Notices' dropdown menu with a 'Select' button. The dropdown list includes various forms, with 'Permanency Roundtable Skills Case Summary Form A', 'Permanency Roundtable Skills Case Summary Form B', and 'Permanency Roundtable Skills Case Summary Form C' highlighted in a red box.

5. Select which **PRT Form** to complete.

Important: In order to fully complete the entire **PRT Skills Case Summary Form**, the user will need to complete the parameters screen, generate, print, and save each section (A, B, and C) of the report.

Completing a Permanency Roundtable Skills Case Summary Form

Completing the PRT Skills Case Summary Form A

1. Select **Permanency Roundtable Skills Case Summary Form A** from the **Forms/Notices** drop-down list.

Maintain Forms/Notices

Forms/Notices: Select

- Application for Federal Student Aid
- Close Letter to Parent/Guardian
- District Notice Report
- Help Me Grow Referral Form
- Help Me Grow Referral Letter
- JFS 01443 - Child's Education Information
- JFS 01443 - Child's Health Information
- JFS 01610 - Child's Permanency Planning Data Summary
- JFS 01645 - Agreement for Temporary Custody of Child
- JFS 01645 - Part II Agreement for Temporary Custody of Child (Extension)
- JFS 01645 - Part III Termination of Agreement for Temporary Custody of Child
- JFS 01647 - Face Sheet
- JFS 01666 - Permanent Surrender Form
- JFS 01695 - Application for Search of Ohio Putative Father Registry
- Notice to the Court
- Ongoing Case Closure Checklist (Form)
- Permanency Roundtable Skills Case Summary Form A**
- Permanency Roundtable Skills Case Summary Form B
- Permanency Roundtable Skills Case Summary Form C
- Person Overview
- Semi-Annual Review Meeting Notice
- Wardship Letter

2. Click the **Select** button.

The **Document Details** screen appears.

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Case » Workload » Reports

Document Details

Document Category: Work-Item ID: 10 Document Title: **Permanency Roundtable Skills Case Summary Form A**

Task ID: 10 Task Reference:

Document History

ID	Date Created	Employee ID	Name
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Generate Report

Cancel

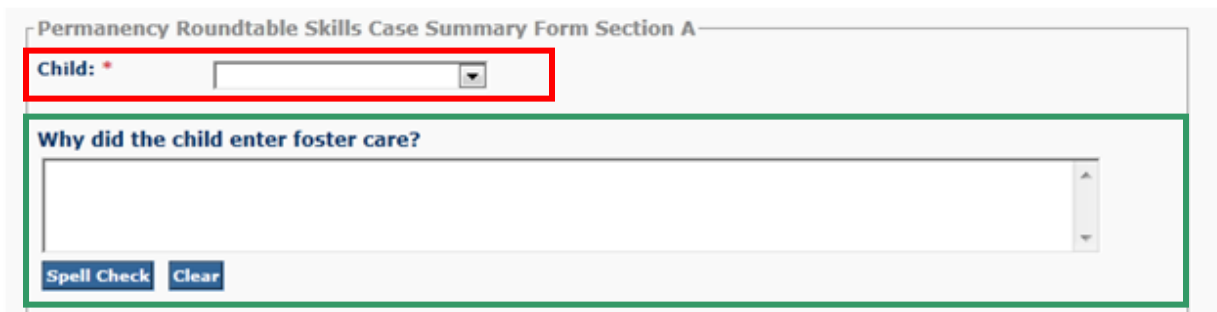
3. Click the **Generate Report** button.

Completing a Permanency Roundtable Skills Case Summary Form

The **PRT Skills Case Summary Form Section A** parameters screen appears.

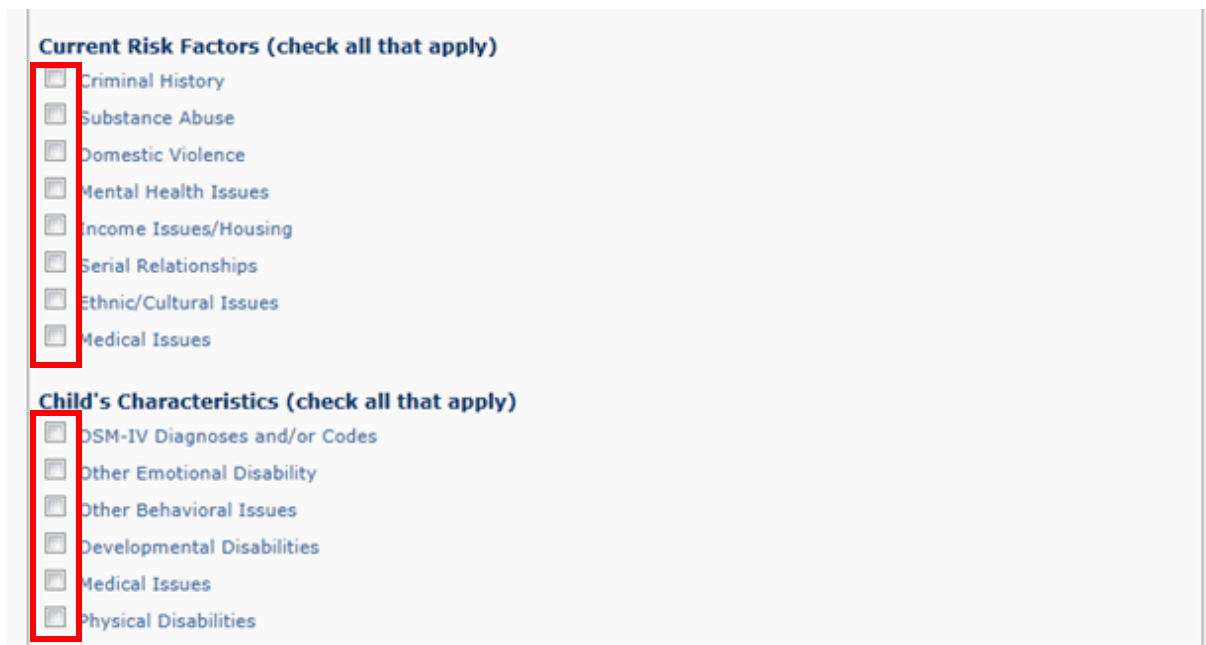
Important: The information entered on the parameters screen **Cannot** be saved for the user to complete at a later time.

4. Select the **Child**, for which you wish to generate the report, from the drop-down list. (Required)
5. Use the text box to answer the question, '**Why did the child enter foster care?**'.



The screenshot shows the 'Permanency Roundtable Skills Case Summary Form Section A' parameters screen. A red box highlights the 'Child: *' dropdown menu. A green box highlights the 'Why did the child enter foster care?' text area, which includes a 'Spell Check' button and a 'Clear' button.

6. Check the appropriate boxes to complete the **Current Risk Factors** and **Child's Characteristics** sections.



The screenshot shows the 'Current Risk Factors (check all that apply)' and 'Child's Characteristics (check all that apply)' sections. A red box highlights the checkboxes for 'Criminal History', 'Substance Abuse', 'Domestic Violence', 'Mental Health Issues', 'Income Issues/Housing', 'Serial Relationships', 'Ethnic/Cultural Issues', and 'Medical Issues' in the 'Current Risk Factors' section. Another red box highlights the checkboxes for 'DSM-IV Diagnoses and/or Codes', 'Other Emotional Disability', 'Other Behavioral Issues', 'Developmental Disabilities', 'Medical Issues', and 'Physical Disabilities' in the 'Child's Characteristics' section.

Completing a Permanency Roundtable Skills Case Summary Form

7. Select the appropriate radio button to answer the question, '**Has the youth ever had a pre-adoptive placement?**' (Required)
 - If **Yes** is selected, then the **# of times** is required and the text box is optional.
 - If **No** is selected, then the text box is required.

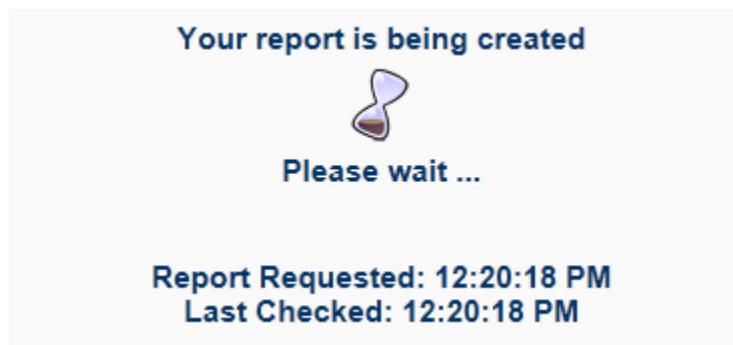
The screenshot shows a form section titled "Has youth ever had a pre-adoptive placement? *". There are two radio buttons: "Yes --> # of times:" and "No --> Why not?". The "Yes" radio button is selected and circled in red. Next to it is a small dropdown menu. Below the radio buttons is a large text input area, which is outlined with a green border. At the bottom of the text area are two buttons: "Spell Check" and "Clear".

8. Enter the **Date(s)** for the most recent plan/assessment using the calendar field.

The screenshot shows two date entry fields. The first is labeled "Date of most recent Comprehensive Behavioral Health Plan (CBHB) or Comprehensive Assessment (CFA) :" and the second is labeled "Date of most recent psychological evaluation :". Both fields have a calendar icon to their right. A red rectangle highlights these two fields. Below the fields are two buttons: "Generate Report" (circled in red) and "Cancel".

9. Click the **Generate Report** button.

The message **Your report is being created** appears while the report is generating.



Completing a Permanency Roundtable Skills Case Summary Form

The **Permanency Roundtable Skills Case Summary Form** (Section A) appears.

Important: The user **Cannot** modify the completed form after it has been **Printed** or **Saved**. Prior to **Printing** or **Saving** the generated form, review it for errors and click the **Review Parameters** button, if needed, to make modifications.

10. To **Save** the generated form to the application, click the **Save** button.

Note: To **Print** the PDF or to **Save** the PDF to your computer, hover the mouse over the screen until the **Task Bar** (outlined in green above) appears. Click the **Disk** button to **Save** the report or the **Printer** button to **Print** the report.

Completing a Permanency Roundtable Skills Case Summary Form

Completing the PRT Skills Case Summary Form B

1. Select **Permanency Roundtable Skills Case Summary Form B** from the **Forms/Notices** drop-down list.

The screenshot shows the 'Maintain Forms/Notices' interface. On the left is a sidebar with various navigation links. The main area has a 'Forms/Notices' dropdown menu that is open, displaying a list of forms. 'Permanency Roundtable Skills Case Summary Form B' is highlighted with a red box. A red circle highlights the 'Select' button.

Forms/Notices:
Application for Federal Student Aid
Close Letter to Parent/Guardian
District Notice Report
Help Me Grow Referral Form
Help Me Grow Referral Letter
JFS 01443 - Child's Education Information
JFS 01443 - Child's Health Information
JFS 01610 - Child's Permanency Planning Data Summary
JFS 01645 - Agreement for Temporary Custody of Child
JFS 01645 - Part II Agreement for Temporary Custody of Child (Extension)
JFS 01645 - Part III Termination of Agreement for Temporary Custody of Child
JFS 01647 - Face Sheet
JFS 01666 - Permanent Surrender Form
JFS 01695 - Application for Search of Ohio Putative Father Registry
Notice to the Court
Ongoing Case Closure Checklist (Form)
Permanency Roundtable Skills Case Summary Form A
Permanency Roundtable Skills Case Summary Form B
Permanency Roundtable Skills Case Summary Form C
Person Overview
Semi-Annual Review Meeting Notice
Wardship Letter

2. Click the **Select** button.

The **Document Details** screen appears.

The screenshot shows the 'Document Details' screen. The 'Document Title' field is highlighted with a green oval and contains 'Permanency Roundtable Skills Case Summary Form B'. The 'Generate Report' button is highlighted with a red oval.

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Case » Workload » Reports

Document Details

Document Category: Work-Item ID: Task ID: 10

Document Title: Permanency Roundtable Skills Case Summary Form B

Work-Item Reference: Task Reference:

Document History

ID	Date Created	Employee ID	Name
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Generate Report

Cancel

3. Click the **Generate Report** button.

Completing a Permanency Roundtable Skills Case Summary Form

The **PRT Skills Case Summary Form Section B** parameters screen appears.

Reminder: The information entered on the parameters screen **Cannot** be saved for the user to complete at a later time.

4. Select the **Child**, for which you wish to generate the report, from the drop-down list. (Required)
5. Enter **Narrative** in the text boxes (outlined in green above) to answer the questions as appropriate.
6. Select the appropriate **Radio Button** on applicable questions, as shown below.

7. If the **Child is not attending school, but has not graduated (or received a GED)**, then check the checkbox to indicate this information on the form.

Child is not attending school, but has not graduated (or received a GED Certificate): ☐

Completing a Permanency Roundtable Skills Case Summary Form

8. Complete the additional questions using the instructions from **Steps 5 and 6** as applicable.
9. To answer the question, '**What is the date of the child's last Learning and/or development exam?**' enter a **Date** by using the calendar field.

As a result of the child's last medical and/or dental exam(s), were services recommended? If services were recommended, list service(s), dates, and how well service(s) are addressing youth's needs. Include past services and reason(s) for termination.

☐ Yes ☐ No

Spell Check Clear

As a result of the child's last mental health or psychological exam, were services recommended? If services were recommended, list service(s), dates, and how well service(s) are addressing youth's needs. Include past services and reason(s) for termination.

☐ Yes ☐ No ☐ N/A

Spell Check Clear

What is the date of the child's last Learning and/or developmental exam?

What is the child's diagnosis as a result of the last Learning and/or developmental exam?

Spell Check Clear

As a result of the child's last Learning and/or developmental exam(s), were services recommended? If services were recommended, list service(s), dates, and how well service(s) are addressing youth's needs. Include past services and reason(s) for termination.

☐ Yes ☐ No ☐ N/A

Spell Check Clear

As a result of the child's last substance abuse assessment, were services recommended? If services were recommended, list service(s), dates, and how well service(s) are addressing youth's needs. Include past services and reason(s) for termination.

☐ Yes ☐ No ☐ N/A

Spell Check Clear

Please describe the youth's challenges and needs that may affect Permanency:

Spell Check Clear

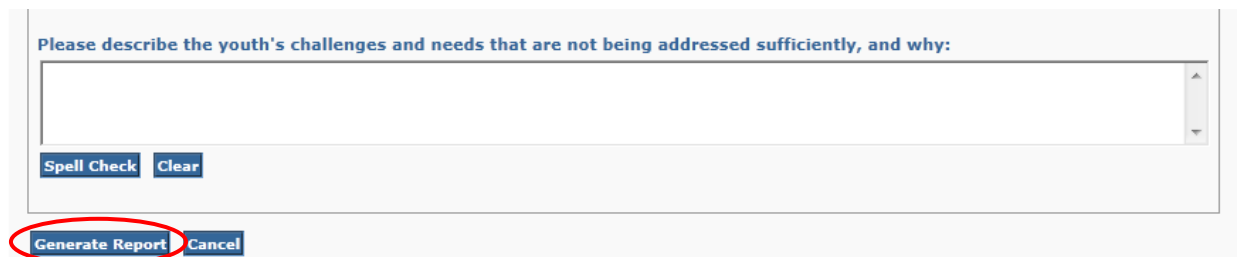
Please describe the youth's challenges and needs that are not being addressed sufficiently, and why:

Spell Check Clear

Generate Report Cancel

Completing a Permanency Roundtable Skills Case Summary Form

10. Click the **Generate Report** button.

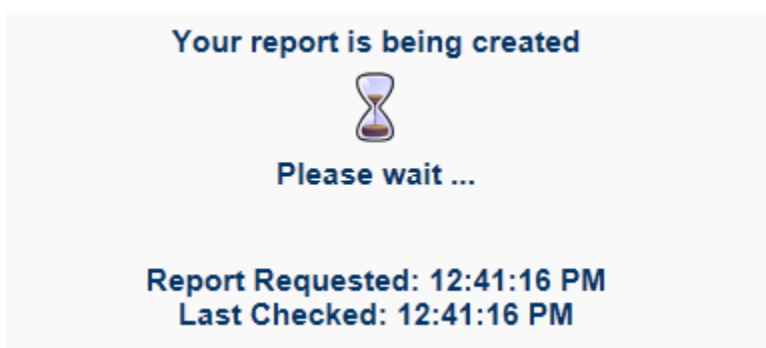


Please describe the youth's challenges and needs that are not being addressed sufficiently, and why:

Spell Check Clear

Generate Report Cancel

The message **Your report is being created** appears while the report is generating.



The **Permanency Roundtable Skills Case Summary Form** (Section B) appears.

Completing a Permanency Roundtable Skills Case Summary Form

Important: The user cannot modify the completed form after it has been **Printed** or **Saved**. Prior to **Printing** or **Saving** the generated form, review it for errors and click the **Review Parameters** button, if needed, to make modifications.

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SECTION B: CASE MANAGER SUMMARY REFERRAL FORM INSTRUCTIONS TO CASE MANAGER: Please briefly address each item in this section, without identifying specific individuals, service providers, or facilities by name.

Additional Information about the child's situation

Child's strengths, available supports, positives in child's life:

Child's religious and cultural background and/or connections:

Please rate/comment on the child's engagement (i.e., attendance, participation) in case planning, family team meetings, visitation, etc.:

Very engaged [] Somewhat engaged [] Not very engaged [] Not at all engaged []

Comments:

EDUCATION STATUS

[] Attending School (if so, what grade:) [] Not attending school [] Graduated from high school

MEDICAL/DENTAL

Date of most recent medical exam: None recorded Date of most recent dental exam: None recorded

Diagnosis or identified special needs (medical): Diagnosis or identified special needs (dental):

Were services recommended? [] Yes [] No --> If yes, list service(s), dates, and how well service(s) are addressing youth's needs. Include past services and reason(s) for termination.

EMOTIONAL/BEHAVIORAL HEALTH

Date of most recent mental health or psychological exam: None recorded

Diagnosis or identified special needs: None recorded

Were services recommended? [] Yes [] No --> If yes, list service(s), dates, and how well service(s) are addressing youth's needs. Include past services and reason(s) for termination.

LEARNING/DEVELOPMENTAL DELAYS

Date of most recent developmental exam:

Diagnosis or identified special needs:

Were services recommended? [] Yes [] No --> If yes, list service(s), dates, and how well service(s) are addressing youth's needs. Include past services and reason(s) for termination.

SUBSTANCE ABUSE

Task Bar: [Save] [Print] [Review Parameters]

Save Cancel Review Parameters

11. To **Save** the generated form to the application, click the **Save** button.

Note: To **Print** the PDF or to **Save** the PDF to your computer, hover the mouse over the screen until the **Task Bar** (outlined in green above) appears. Click the **Disk** button to **Save** the report or the **Printer** button to **Print** the report.

Completing a Permanency Roundtable Skills Case Summary Form

Completing the PRT Skills Case Summary Form C

1. Select **Permanency Roundtable Skills Case Summary Form C** from the **Forms/Notices** drop-down list.
2. Click the **Select** button.

The **Document Details** screen appears.

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Case » Workload » Reports

Document Details

Document Category: Document Title: **Permanency Roundtable Skills Case Summary Form C**

Work-Item ID: Work-Item Reference:

Task ID: 10 Task Reference:

Document History

ID	Date Created	Employee ID	Name
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Document History

Generate Report

Cancel

3. Click the **Generate Report** button.

The **Permanency Roundtable Skills Case Summary Form Section C** parameters screen appears.

Reminder: The information entered on the parameters screen **Cannot** be saved for the user to complete at a later time.

Completing a Permanency Roundtable Skills Case Summary Form

Important: All of the information generated for **Section C** of the report is pulled from the user entered information on the **Section C Parameters** screen.

Permanency Roundtable Skills Case Summary Form Section C

Child: *

Have the youth's current caregivers ever been asked to be a permanent resource (that is, a person willing to care for the youth on a more permanent basis)?

☐ Yes ☐ No (If no, please explain)

Spell Check Clear

Are the youth's current caregivers interested in being a permanent resource?

☐ Yes ☐ No (If no, please explain) ☐ Don't Know

Spell Check Clear

4. Select the **Child**, for which you wish to generate the report, from the drop-down list. (Required)
5. Select the appropriate **Radio Button** (outlined in green above) on applicable questions.
 - Enter comments regarding the answer, in the text box provided.
6. Complete the **Youth's Connections**, if applicable.
 - Enter the **Name** of the **Connection**.
 - Specify the **Relationship**, **Relationship Quality**, etc. by completing the applicable fields.

Please provide information regarding the Youth's Connections:

Name	Relationship to Youth	Quality of Relationship	Is relationship, or lack thereof, a barrier to Permanency?	Already explored and excluded?	Date Contacted	Outcome/Comments
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>	<input type="text"/>

Completing a Permanency Roundtable Skills Case Summary Form

7. Enter **Narrative** in the text boxes to answer the questions as appropriate.

What do you believe to be the primary barriers to Permanency for this youth?

Spell Check Clear

Describe any agency/policy factors that affect progress towards Permanency for the youth. Explain:

Spell Check Clear

Describe any court factors that affect progress towards Permanency for the youth. Explain:

Spell Check Clear

Additional Information regarding barriers to Permanency:

Spell Check Clear

What is the child's vision of Permanency?

Spell Check Clear

What is the child's primary caregiver's vision for permanency?

Spell Check Clear

What do you think is the best possible, but realistic, Permanency outcome for this child in the next six months?

Spell Check Clear

What supports would you as the case manager need to help the child achieve that Permanency outcome in the next six months?

Spell Check Clear

8. Document the **Permanency Plan** for the child by selecting the appropriate **Radio Button**.
9. Enter a **Target Date**.
10. Document the **Second Permanency Plan** for the child by selecting the appropriate **Radio Button**, if applicable.

What is the Primary Permanency Plan for the child?

☐ Reunification

☐ Adoption: Relative

☐ Legal Custody/Guardianship: Relative

☐ Adoption: Non-Relative

☐ Legal Custody/Guardianship: Non-Relative

☐ Emancipation with a Permanent Connection (a permanent connection is defined as having a relationship with at least one adult that includes five points: parenting, life-long intent, belonging, status and unconditional commitment)

Target Date:

If applicable, what is the Second Permanency Plan for the child?

☐ Adoption: Relative

☐ Legal Custody/Guardianship: Relative

☐ Adoption: Non-Relative

☐ Legal Custody/Guardianship: Non-Relative

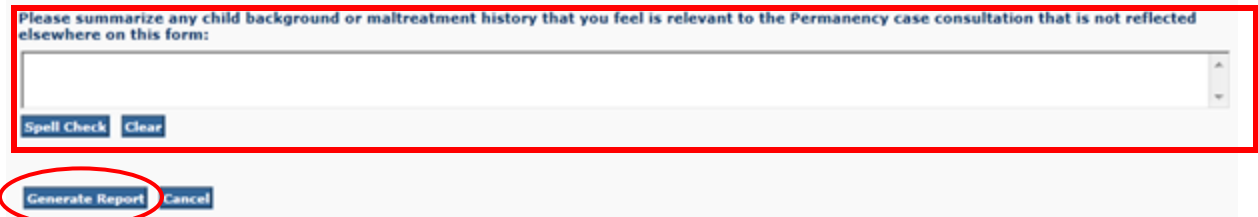
☐ Emancipation with a Permanent Connection (a permanent connection is defined as having a relationship with at least one adult that includes five points: parenting, life-long intent, belonging, status and unconditional commitment)

☐ Emancipation with No Permanent Connection

Completing a Permanency Roundtable Skills Case Summary Form

11. Summarize any other relevant **Background** or **Maltreatment** information, in the text box, if needed.

12. Click the **Generate Report** button.

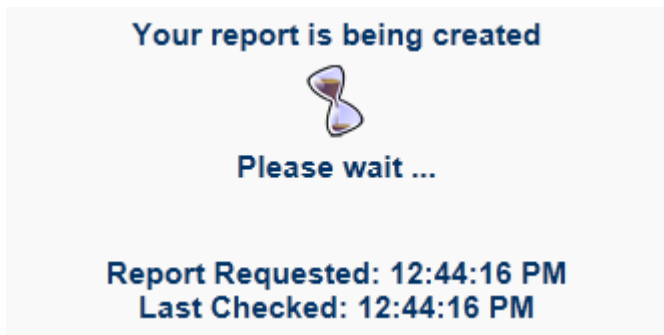


Please summarize any child background or maltreatment history that you feel is relevant to the Permanency case consultation that is not reflected elsewhere on this form:

Spell Check Clear

Generate Report Cancel

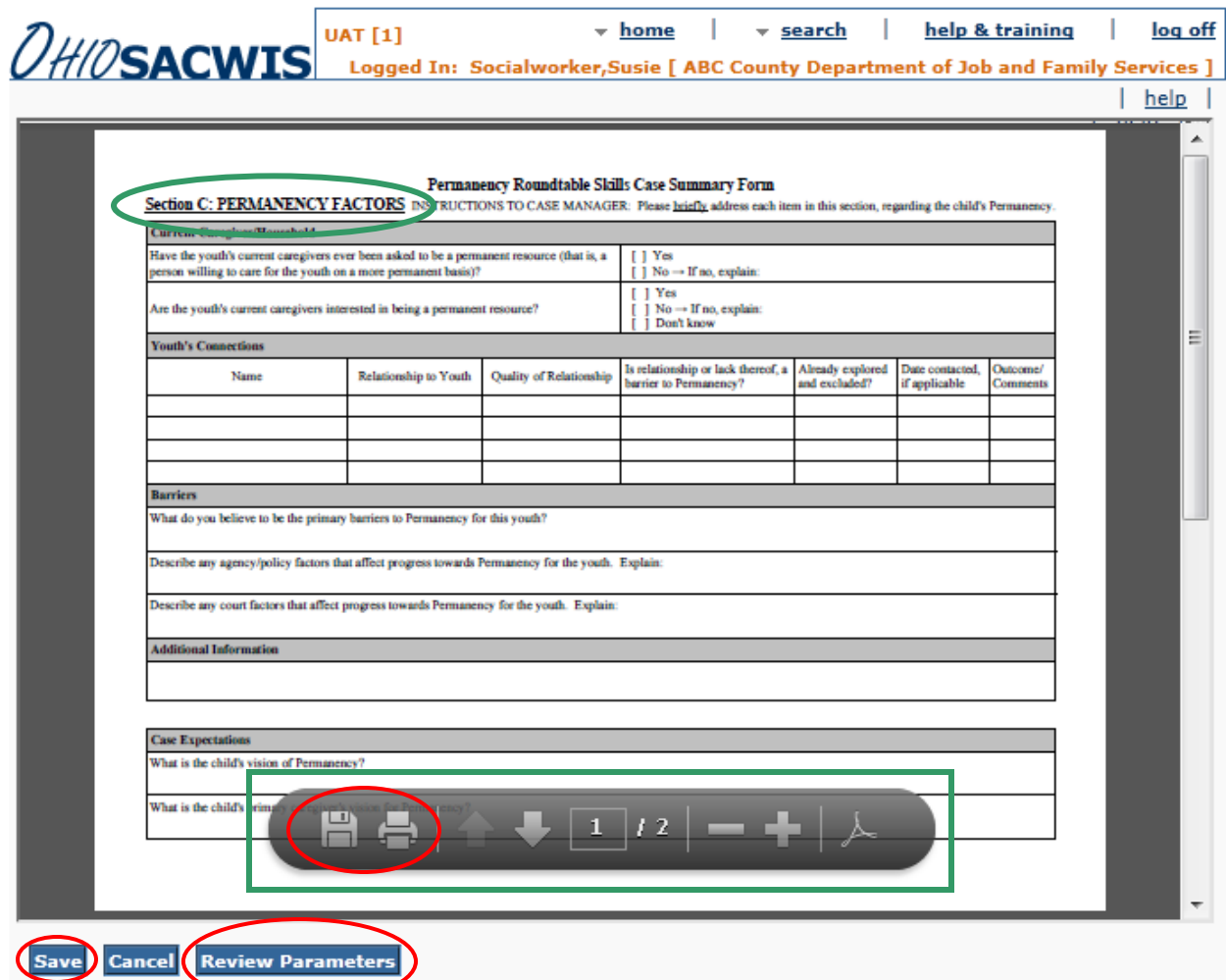
The message **Your report is being created** appears while the report is generating.



The **Permanency Roundtable Skills Case Summary Form** (Section C) appears.

Completing a Permanency Roundtable Skills Case Summary Form

Important: The user cannot modify the completed form after it has been **Printed** or **Saved**. Prior to **Printing** or **Saving** the generated form, review it for errors and click the **Review Parameters** button, if needed, to make modifications.



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Permanency Roundtable Skills Case Summary Form

Section C: PERMANENCY FACTORS INSTRUCTIONS TO CASE MANAGER: Please briefly address each item in this section, regarding the child's Permanency.

Current Placement/Residence

Have the youth's current caregivers ever been asked to be a permanent resource (that is, a person willing to care for the youth on a more permanent basis)? ☐ Yes ☐ No -- If no, explain:

Are the youth's current caregivers interested in being a permanent resource? ☐ Yes ☐ No -- If no, explain: ☐ Don't know

Youth's Connections

Name	Relationship to Youth	Quality of Relationship	Is relationship or lack thereof, a barrier to Permanency?	Already explored and excluded?	Date contacted, if applicable	Outcome/Comments

Barriers

What do you believe to be the primary barriers to Permanency for this youth?

Describe any agency/policy factors that affect progress towards Permanency for the youth. Explain:

Describe any court factors that affect progress towards Permanency for the youth. Explain:

Additional Information

Case Expectations

What is the child's vision of Permanency?

What is the child's timeline for achieving Permanency?

Task Bar: Disk, Printer, Up, Down, 1, 2, -, +, PDF

Buttons: Save, Cancel, Review Parameters

13. To **Save** the generated form to the application, click the **Save** button.

Note: To **Print** the PDF or to **Save** the PDF to your computer, hover the mouse over the screen until the **Task Bar** (outlined in green above) appears. Click the **Disk** button to **Save** the report or the **Printer** button to **Print** the report.

Completing a Permanency Roundtable Skills Case Summary Form

Mapping Document

This section explains the **Mapping** between the information on the generated **PRT Skills Case Summary Form** and which area (Person, Case, Intake, etc.) and screen field each **Data Element** is pulled from into the report. This mapping document is meant to assist the user in updating the child's information prior to generating the report.

Items in **Red** are pulled into the form from the indicated area (Person, Case, Intake, etc.) and screen in SACWIS.

Items in **Green** are user entered on the **PRT Skills Case Summary Form Parameters** screen in SACWIS.

Note: The abbreviation "PP" below refers to the **Person Profile** area in SACWIS.

Mapping Information – Section A

Section A: Face Sheet Instructions to Case Manager: Please complete the Case Summary information.				
Child Demographics				
Case ID #: Case ID		Child First Name: Person Profile (PP): Basic page		Child Last Name: PP: Basic page
Date of Birth: PP: Basic page	Gender: PP: Basic page <input type="checkbox"/> Male <input type="checkbox"/> Female	Race: <i>(check all that apply)</i> <div style="display: flex; justify-content: space-between;"> <div> <input type="checkbox"/> White <input type="checkbox"/> Black <input type="checkbox"/> American Indian/ Alaska Native </div> <div> <input type="checkbox"/> Asian <input type="checkbox"/> Native Hawaiian / Pacific Islander <input type="checkbox"/> Other <i>(please specify):</i> </div> </div> PP: Demographics page		Origin/Ethnicity (any race): PP: Demographics page <input type="checkbox"/> Hispanic / Latino <input type="checkbox"/> Non-Hispanic / Latino
Date of first referral to PCSA: Intake (IN): Decision page (1st CA/N, FINS or Dependency intake where child was an ACV or CSR)				
Child Abuse and Neglect History (if lengthy, please attach a chronological history of reports, disposition, removals, and types of abuse/neglect): Intake (IN): For CA/N History: Pulls in only those intakes where child was ACV/CSR and Intake was screened in or screened in AR. Displays all intakes that required a disposition which are intake categories of CA/N all types and FINS with type of "Stranger Danger". Intake information displayed: Intake ID / Intake Type / Intake Allegation Disposition Date Disposition				

Completing a Permanency Roundtable Skills Case Summary Form

Child Placement and Characteristics			
Why did the child enter foster care? User entered on Form A			
Date of first entry into foster care: <i>Case: Initial Removal page (1st removal record)</i>	Agency of placement: <i>Case: Placement page – from current placement record</i>	Total number of months in foster care: <i>Case: Legal Custody/Status page – calculates total months in custody to the nearest month</i>	
Date of most recent entry into foster care: <i>Case: Initial Removal page (most recent removal record)</i>	Number of entries into foster care: <i>Case: Legal Custody/Status – calculates the number of custody episodes for child</i>	Has siblings in foster care: Yes <input type="checkbox"/> No <input type="checkbox"/> <i>Case: Sibling Relationships and Legal Custody/Status of siblings – checks to see if child has persons identified as brothers or sisters (bio, adopt, half, step) in agency custody</i>	Lives with at least one sibling: Yes <input type="checkbox"/> No <input type="checkbox"/> <i>Case: Sibling Rel, Legal Cust/Status and Placement of siblings – Provider ID must equal</i>
Number of placements (across multiple episodes): <i>Case: Placement records – For all custody episodes, counts the number of total placements (not including same provider ID for consecutive placement)</i>	Number of moves since most recent foster care admission: <i>Case: Placement records – For most recent custody episode, counts the number of moves since 1st placement (not including same provider ID for consecutive placement)</i>	ICPC (Interstate Compact on the Placement of Children)? Yes <input type="checkbox"/> No <input type="checkbox"/> <i>Case: ICPC/ICAMA page – If active record, “Yes” is checked</i> If yes, explain: <i>Case: ICPC/ICAMA – Provider Type listed in child info tab</i>	
Reason for most recent entry into foster care: Primary reason: <i>Case: Initial Removal page – Primary Removal Reason listed</i> Secondary reason(s): <i>Case: Initial Removal page – Lists all Secondary Removal Reasons selected</i>		Current Risk Factors (check ALL that apply): User entered on Form A <input type="checkbox"/> Criminal History <input type="checkbox"/> Substance abuse <input type="checkbox"/> Domestic Violence <input type="checkbox"/> Mental Health Issues <input type="checkbox"/> Income Issues/Housing <input type="checkbox"/> Serial Relationships <input type="checkbox"/> Ethnic/Cultural Issues <input type="checkbox"/> Medical Issues	Child's Characteristics (check ALL that apply): User entered on Form A <input type="checkbox"/> DSM-IV Diagnoses and/or Codes <input type="checkbox"/> Other Emotional Disability <input type="checkbox"/> Other Behavioral Issues <input type="checkbox"/> Developmental Disabilities <input type="checkbox"/> Medical Issues <input type="checkbox"/> Physical Disabilities
Has youth ever been placed with a relative?	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="checkbox"/> Yes → # of times: <i>Case: Placement page</i> <input type="checkbox"/> No → why not? <i>Case: Case Plan – If no records indicate a relative relationship, “No” will be checked; the “why not?” pulls text from current Case Plan: Placement Information Settings page</i> </div> <div style="width: 50%;"> If yes, who and when? : <i>“Yes” checkbox will be checked if placement record indicates a relative relationship in “Relationship to Child” dropdown; the “# of times” will equal the # of placement records with relative relationships; and “If yes, who and when” will list the provider name(s) and date for each record</i> </div> </div>		

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Has youth ever had a pre-adoptive placement?	<input type="checkbox"/> Yes → # of times: User entered on Form A <input type="checkbox"/> No → why not?	
Has youth ever experienced a disruption in placement?	<input type="checkbox"/> Yes → # of times: Case: Placement <input type="checkbox"/> No If yes, reason for most recent disruption: “Yes” checkbox will be checked if a placement record had an end reason of non-adoptive disruption or any other end reason and the “Was there an effort to maintain placement?” question was answered “Yes”; the “# of times” will be a count of the disruptions; and “If yes...” pulls from “Explain the circumstances that led to removal” field	
Has youth ever experienced an adoption disruption?	<input type="checkbox"/> Yes → # of times: Case: Placement <input type="checkbox"/> No If yes, explain: “Yes” checkbox will be checked if a placement record had an end reason of adoptive disruption; the “# of times” will be based on # of placements with an end reason of adoptive disruption; and “If yes, explain” pulls from “Explain the circumstances that led to removal” field	
Child and Family Assessments (Print or scan most recent recommendations and attach to this Case Summary form.)		
Date of most recent or Case Plan: Case: Case Plan – Most recent case plan status date including “in progress” case plan	Date of most recent Comprehensive Behavioral Health Plan (CBHB) or Comprehensive Assessment (CFA): User entered on Form A	Date of most recent Psychological Evaluation: User entered on Form A
Case Manager		
Current Case Manager Name: Primary Worker assigned	Current Case Manager Phone #: Primary Worker assigned phone #	Date Case Manager Assigned to Case: Primary Worker assigned date
Supervisor Name: Supervisor of Primary Worker assigned		
Case Plans		
Date of most recent Permanency Goal Approved: Case: Case Plan – Most recent case plan status date including “in progress” case plan	Permanency Goal: Case: Case Plan: For most recent case plan: Identifying Information page – child’s permanency goal	
Date Last Case Plan Updated: Case: Case Plan – Most recent case plan status date including “in progress” case plan		
Date of Independent Living Plan: Case: Independent Living page – Effective Date of Independent Living Plan	Describe Independent Living Plan and readiness to exit foster care: Case: Independent Living page – Readiness Review tab – Comments from most recent Readiness Review	
Restrictiveness of Placement		
Case: Placement page – Placement Type for current placement record		

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Date youth entered current placement:

Case: Placement page – Begin Date for current placement record

Mapping Information – Section B

Section B: Case Manager Summary Referral Form Instructions to Case Manager: Please address briefly each of the items in this section, without identifying specific individuals, service providers or facilities by name on this form.

Additional Child Information <i>Describe:</i>					
Child strengths, available supports; positives in child's life: User entered on Form B					
Child's religious and cultural background and/or connections: User entered on Form B					
Please rate/comment on the child's engagement (i.e., attendance, participation) in case planning, family team meetings, visitation, etc.:	Very engaged <input type="checkbox"/>	Somewhat engaged <input type="checkbox"/>	Not very engaged <input type="checkbox"/>	Not at all engaged <input type="checkbox"/>	Comments: Checkbox and Comments are user entered on Form B
EDUCATION STATUS <i>For the "Attending school" question: Person Profile (PP): Education page then Performance Tab – Pulls from most recent record in Academic Evaluation History section; checkbox and grade pull from latest Evaluation Date and Grade Level selected in dropdown.</i> <i>"Graduated from high school" checkbox also pulls from most recent record in Academic Evaluation History, but from part 2 page if either "High School Diploma Received" or "GED Certificate Received" checkbox is checked.</i>					
<input type="checkbox"/> Attending school (if so, what grade:) <input type="checkbox"/> Not attending school User entered on Form B <input type="checkbox"/> Graduated from high school					
MEDICAL/DENTAL <div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> Date of most recent medical exam: <i>(PP): Medical page then Treatment Tab – Treatment History section: Pulls most recent date when Treatment Type = Medical and Primary Service Type = one of the following: 30 or 60 day Healthcheck, Annual Healthcheck, Non-Annual Physical or Well Child</i> </div> <div style="width: 48%;"> Date of most recent dental exam: <i>(PP): Medical page then Treatment Tab – Treatment History section: Pulls most recent date when Treatment Type = Dental and Primary Service Type = one of the following: 30 or 60 day Healthcheck, Annual Healthcheck or Exam/Cleaning</i> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="width: 48%;"> Diagnosis or identified special needs (medical): <i>Diagnosis for medical and dental Treatment History pulls any text listed in the Diagnosis/Results field from the most recent record as described above in medical/dental date section</i> </div> <div style="width: 48%;"> Diagnosis or identified special needs (dental): </div> </div>					

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Were services recommended? <input type="checkbox"/> Yes <input type="checkbox"/> No	→ If yes, list service(s), dates, and how well service(s) are addressing youth's needs. Include past services and reason(s) for termination: "Were services recommended?" checkbox and "If yes..." comments are user entered on Form B
EMOTIONAL/BEHAVIORAL HEALTH Date of most recent mental health or psychological exam: <i>(PP): Medical page then Treatment Tab – Treatment History section: Pulls most recent date when Treatment Type = Mental and Primary Service Type = one of the following: Psychological Assessment, Psychiatric Assessment or Mental Assessment</i>	
Diagnosis or identified special needs: <div style="display: inline-block; vertical-align: top; margin-left: 10px;"> AXIS I - <i>Pulls any text listed in any/each of the DSM-IV Axis fields</i> AXIS II - AXIS III - AXIS IV - AXIS V - </div>	
Were services recommended? <input type="checkbox"/> Yes <input type="checkbox"/> No	→ If yes, list service(s), dates, and how well service(s) are addressing youth's needs. Include past services and reason(s) for termination: "Were services recommended?" checkbox and "If yes..." comments are user entered on Form B
LEARNING/DEVELOPMENTAL DELAYS Date of most recent developmental exam: User entered on Form B Diagnosis or identified special needs: User entered on Form B	
Were services recommended? <input type="checkbox"/> Yes <input type="checkbox"/> No	→ If yes, list service(s), dates, and how well service(s) are addressing youth's needs. Include past services and reason(s) for termination: "Were services recommended?" checkbox and "If yes..." comments are user entered on Form B
SUBSTANCE ABUSE Date of most recent substance abuse assessment: <i>(PP): Medical page then Treatment Tab – Treatment History section: Pulls most recent date when Treatment Type = Mental and Primary Service Type = Drug and Alcohol Assessment</i>	
Diagnosis or identified special needs: <div style="display: inline-block; vertical-align: top; margin-left: 10px;"> AXIS I - <i>Pulls any text listed in Axis I and/or Axis II of the DSM-IV Axis fields</i> AXIS II - </div>	
Were services recommended? <input type="checkbox"/> Yes <input type="checkbox"/> No	→ If yes, list service(s), dates, and how well service(s) are addressing youth's needs. Include past services and reason(s) for termination: "Were services recommended?" checkbox and "If yes..." comments are user entered on Form B
If not indicated above, please describe youth's challenges and needs that may affect permanency: User entered on Form B	
If not indicated above, please describe youth's challenges and needs that are not being addressed sufficiently, and why: User entered on Form B	

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Mapping Information – Section C

Note: All information in Section C is user entered on Form C.

Section C: Permanency Factors Instructions to Case Manager: Please briefly address each item in this section, regarding the child's Permanency.

Current Caregiver/Household											
Have the youth's current caregivers ever been asked to be a permanent resource (that is, a person willing to care for the youth on a more permanent basis)?				<input type="checkbox"/> Yes <input type="checkbox"/> No → If no, explain:							
Are the youth's current caregivers interested in being a permanent resource?				<input type="checkbox"/> Yes <input type="checkbox"/> No → If no, explain: <input type="checkbox"/> Don't know							
Youth's Connections											
Name	Relationship to Youth	Quality of Relationship			Is relationship or lack thereof, a barrier to Permanency?			Already explored and excluded?		Date contacted, if applicable	Outcome/Comments
		Good	Fair	Poor	Yes	No		Yes	No		
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		
Barriers											
What do you believe to be the primary barriers to Permanency for this youth?											
Describe any agency/policy factors that affect progress towards Permanency for the youth. Explain:											
Describe any court factors that affect progress towards Permanency for the youth. Explain:											
Additional Information											

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Case Expectations
What is the child's vision of Permanency?
What is the child's primary caregiver's vision for Permanency?
What do you think is the best possible – but realistic – Permanency outcome for this child in the next six months?
What supports would you as the case manager need to help the child achieve that Permanency outcome in the next six months?
<p>What is the Primary Permanency Plan?</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="checkbox"/> Reunification <input type="checkbox"/> Adoption: Relative <input type="checkbox"/> Adoption: Non Relative Target date: </div> <div style="width: 45%;"> <input type="checkbox"/> Legal Custody/Guardianship: Relative <input type="checkbox"/> Legal Custody/Guardianship: Non-Relative <input type="checkbox"/> Emancipation with a Permanent Connection (a permanent connection is defined as having a relationship with at least one adult that includes five points: parenting, life-long intent, belonging, status, and unconditional commitment) </div> </div>
<p>If applicable, what is the Secondary Permanency Plan?</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="checkbox"/> Adoption: Relative <input type="checkbox"/> Adoption: Non-Relative <input type="checkbox"/> Emancipation with No Permanent Connection </div> <div style="width: 45%;"> <input type="checkbox"/> Legal Custody/Guardianship: Relative <input type="checkbox"/> Legal Custody/Guardianship: Non-Relative <input type="checkbox"/> Emancipation with a Permanent Connection (a permanent connection is defined as having a relationship with at least one adult that includes five points: parenting, life-long intent, belonging, status, and unconditional commitment) </div> </div>
Additional Background
Please summarize any child background or maltreatment history that you feel is relevant to the Permanency case consultation that is not reflected elsewhere on this form: