Completing a Pre-Adoptive Staffing Record

Knowledge Base Article

Completing a Pre-Adoptive Staffing Record

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Overview

Following the receipt of Permanent Custody (PC) or Permanent Surrender (PS) awarded to your agency for the child, agency assigned adoption personnel will complete a Pre-Adoptive Staffing record in SACWIS. Once the Pre-Adoptive Staffing information is entered, agency assigned adoption personnel can generate the Initial JFS 01690 (Documentation of the Pre-Adoptive Staffing and Updates). The data recorded in the SACWIS Pre-Adoptive Staffing record prints on the JFS 01690 report. You are now able to generate the following new reports:

- Generate Invitations
- Signatures Page Report

Important Specifications:

There are names/roles of persons that will automatically pull into the Pre-Adoptive Staffing record at creation:

1. Upon creation of the Pre-Adoptive Staffing record, the system will add to the pre-adoptive staffing participants list:

    a. The pre-adoptive staffing participant with Role of Child will always be the first participant listed. If the user chooses to delete this participant, then follow the alphabetical sort as listed below. The Agency / Organization Affiliation and the Participated in Staffing will be blank.

    b. Assigned Adoption worker name and person ID with a Role of Adoption Caseworker. The Agency / Organization Affiliation will be owning agency name and the Participated in Staffing will be blank.

    c. Assigned Adoption Worker's immediate supervisor (with or without assignment) and person ID with a Role of Adoption Supervisor. The Agency / Organization Affiliation will be owning agency name and the Participated in Staffing will be blank.

    d. Any other non-end dated assigned workers with a Case Assignment Role of:

        i. Primary Worker (mapped to PAS Role of Adoption Caseworker)

        ii. Provider Worker (mapped to PAS Role of Provider Caseworker)

        iii. IL Worker (Mapped to PAS Role of IL Worker)

        iv. WWK Worker (mapped to PAS Role of WWK Recruiter)

    e. Non-end dated Associated persons (name) and person IDs where the association is:

        i. CASA (mapped to PAS Role of CASA)

        ii. Caseworker (mapped to PAS Role of Case Manager)

        iii. Foster Parent (mapped to PAS Role of Foster Parent)

        iv. GAL (mapped to PAS Role of GAL)

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     v. Medical Professional (mapped to PAS Role of Medical Professional)

    vi. Kinship Caregiver (mapped to PAS Role of Kinship Caregiver)

   vii. Probation Officer (mapped to PAS Role of Probation Officer)

  viii. Social Worker (mapped to PAS Role of Case Manager)

    ix. Tribal Representative (mapped to PAS Role of Tribal Representative)

    x. WWK Recruiter (mapped to PAS Role of WWK Recruiter)

The Agency/Organization Affiliation and the Participated in Staffing will be blank. The sort order will be alphabetical by person last name, first name. If a person (person ID) has already been added to the participants, then system will not add a duplicate person ID record (if adding from assigned worker and associated persons).

To enter the information and generate the report, complete the following steps:

Creating a Pre-Adoptive Staffing Record

Note: SACWIS has a requirement of only one (1) Pre-Adoptive Staffing record per child. If a child already has a Pre-Adoptive Staffing record created prior to this functionality, you will NOT be able to record another one; the system enforces only one per child.

From the SACWIS Home Page:

1. Click the **Case** tab.
2. Click, **Workload**.
3. Click the appropriate adoption **Case ID** link.

   Note: If you know the **Case ID** number, you can also use the **Search** link at the top of the **Home** screen and navigate to the adoptive child's **Case Overview** screen or you can use other components of the search functionality to locate the case.

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The **Case Overview** screen appears.

4. Click the **Pre-Adoptive Staffing/Matching Conference** link in the navigation menu.

The **Pre-Adoptive Staffing Records** screen appears.

On this screen, you can do the following:

- Create an initial record (add a child)
- Edit an existing record with an **In Progress** status
- Copy a **Completed** record to a sibling (if one exits and the sibling does not already have a Pre-Adoptive Staffing).

1. Make a selection from the drop-down menu under **Child Name**:

Important: The **Child Name** field drop-down list contains the names of **all active children** in the adoption case, but you can only select one name. This name list is dynamic and when a child has a Pre-Adoptive Staffing record, their name will no longer display in this list.

2. Click, **Add Pre-Adoptive Staffing**.

The **Manage Pre-Adoptive Staffing** screen appears, displaying the **Pre-Adoptive Staffing Details** tab page.

3. Enter the appropriate date in the **Date of Pre-Adoptive Staffing** field.

   Note: This field cannot be future dated.

   Note: In the **Pre-Adoptive Staffing Participants** grid, SACWIS will automatically pull in the child's name and the adoption caseworker.

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4. If you need to add an individual who is not already listed, click **Add Participant**, and do a person search. For more information regarding the search function, please see the following KBA: Using Search Functionality.

Manage Pre-Adoptive Staffing

| CASE NAME / ID: | | Adoption / Open (09/13/2017) | |
| CHILD NAME: | | DOB: | |

Pre-Adoptive Staffing Details   Adoptive Child Information   Completion

Date of Pre-Adoptive Staffing: *
10/19/2018

Pre-Adoptive Staffing Participants

	Name / ID	Role	Agency/Organization	Participated	
edit		Child		☐	🗑
edit		Adoption Caseworker		☐	🗑

Add Participant   Generate Invitations

5. Once you receive your search results from the person search, click **select** beside the appropriate name.

Person Search Results

Result(s) 1 to 15 of 120 / Page 1 of 8
☐ Include only active case members

	Person Name / ID	Address	Gender	(Age) DOB	Active Case
select			Female		
	Related Persons ⌄				
select			Female		
	Related Persons ⌄				

The **Pre-Adoptive Staffing Participant Information** screen appears.

6. Make a selection from the **Role** drop-down menu.
7. Enter the name of the individual's Agency/Organization.
8. Click, **Save**.

Pre-Adoptive Staffing Participant Information

| CASE NAME / ID: | | Adoption / Open (09/13/2017) | |
| CHILD NAME: | | DOB: | |

Pre-Adoptive Staffing Participant Information

Person Name:

Role: *
[▾]

Agency/Organization:
[   ]

Save   Cancel

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The **Manage Pre-Adoptive Staffing** screen appears, displaying the added individual in the **Pre-Adoptive Staffing Participants** grid.

> **Note**: You can remove an individual from a record by clicking the trash can icon on the far right of the Pre-Adoptive Staffing Participants grid.

Generating Invitations

1. When you have added all Participants, click, **Generate Invitations**.

The **Reports** screen appears.

2. Click, **Generate Report**.

The **Pre-Adoptive Staffing Invitation** screen appears.

3. Enter the **Scheduled Date**.
4. **Enter the Scheduled Time**.
5. Click, **Generate Report**.

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The following **Preadoptive Staffing Invite** will be generated for each participant involved in Pre-Adoptive Staffing:

6. Click, **Save**.

Pre-Adoptive Staffing Invitation

11/02/2018

RE: Notification of Pre-Adoptive Staffing regarding

Dear

A Pre-Adoptive Staffing for the above listed child is scheduled for 11/01/2018 at 06:00 AM. This staffing will take place at   .

The purpose of this staffing is to share important information that will assist the decision-making team with finding the best adoptive home for the above-named child. During this staffing, the following information will be discussed:

- The social, developmental and medical history of the child
- The placement history of the child, including residential placements, adoption disruptions or dissolutions
- Recruitment efforts planned to find a permanent home for the child
- Strengths and opportunities to consider for the child
- The child's relationships with siblings and other kin
- Therapeutic assessments to consider for the child
- Transition of the case from foster care to adoption, including planning for goodbye visits
- Assessing the child's understanding and readiness for adoption
- Status of Child's Lifebook
- Families who may be interested in adopting the child
- Other needs to discuss in preparing for adoption

If you are unable to attend, please contact   prior to the scheduled staffing date to share any information relevant to the topics listed above.

Thank you,

Caseworker   Supervisor

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Note: The invitations will appear in the **Document History** grid on the **Reports** page.

The **Manage Pre-Adoptive Staffing** screen appears.

    7. Click, **Save**.

The **Pre-Adoptive Staffing Records** screen appears.

Editing an In Progress Record

    1. Click, **edit**, beside the **Pre-Adoptive Staffing ID** number.

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The **Manage Pre-Adoptive Staffing** screen appears.

    2. Click, **edit**, beside the appropriate **Name/ID**.

The **Pre-Adoptive Staffing Participant Information** screen appears.

    3. Edit the **Role** and/or the **Agency/Organization**, as necessary.

    4. When you are finished editing, click, **Save**.

The **Manage Pre-Adoptive Staffing** screen appears.

    1. Click the **Adoptive Child Information** tab (your work will be saved as you navigate through the tabs).

The **Manage Pre-Adoptive Staffing** screen appears, displaying the **Adoptive Child Information** tab page.

    2. If there is a sibling(s) to be considered for placement together, place a checkmark in the box(es) beside the name of the sibling(s).

    Important: When you check the box(es) for the sibling(s), the default response (**No**) to, **All siblings considered for placement together**, will change to, **Yes**.

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Important: If there is a sibling, and he or she is not considered for placement together, you will need to provide a narrative in the, **Explain why all siblings not considered for placement together** text box.

In the **Multi-Ethnic Placement Act Considerations** grid:

3. Select, **Yes** or **No** to the question, **Was an Independent assessment completed using JFS 01688?**. If you answer, Yes, the screen will expand, requesting additional information.
4. On the expanded screen, enter the **Date the JFS 01688 Individual Child Assessment was sent to ODJFS**.
5. Select, **Yes** or **No** (expanded screen), from the drop-down menu under, **Is RCNO permitted to be one of the factors considered in the placement decision for this child?**

In the **Child's Needs** grid, there are six topics that must have narrative to mark the Pre-Adoptive Staffing Complete.

6. Click **edit** in each row to answer each topic.

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The **Pre-Adoptive Staffing Narrative** screen appears, where you will provide details regarding the specific topic (the narrative screen will appear each time you click edit beside a topic).

> **Note**: Within each narrative screen, you can click, **Next** (to proceed through the information requests), or **Previous,** to go back to an earlier topic narrative screen. Your information will be saved as you navigate among the screens.

> **Note**: On each narrative screen, there is a hyperlink titled, **View Person Info**. When you click the link, SACWIS will navigate you to the person page to help you answer each topic.

7. Once you have finished with the narrative for all topics, click **Save** on the last Pre-Adoptive Staffing Narrative page.

The **Manage Pre-Adoptive Staffing** screen appears, displaying the narrative in the **Child's Needs** grid.

1. Click the **Completion** tab.

The **Manage Pre-Adoptive Staffing** screen appears, displaying the **Completion** tab page.

There are six topics in the **Pre-Adoptive Staffing Summary** grid that must have narrative entered to mark the Pre-Adoptive Staffing status complete.

2. Click **edit** beside the first topic in the **Topic** column (you can complete the narratives in any order).]

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Note: For each topic narrative, when you click edit, you will be directed to the **Pre-Adoptive Staffing Narrative** screen, where you will be asked to provide details regarding the specific topic.

Note: Within each narrative screen, you can click, **Next** (to proceed through the information requests), or **Previous** (to go back to an earlier topic narrative screen). Your information will be saved as you navigate among the screens.

The **Pre-Adoptive Staffing Narrative** screen appears.

3. Enter narrative in the **Pre-Adoptive Staffing Narrative Details** grid.
4. When you have completed the narrative for all topics, click, **Save**.

The **Manage Pre-Adoptive Staffing** screen appears, displaying the narrative.

Important: If a Child Recruitment Plan has not been completed, place a checkmark in the check box beside the name of the child. The statement above the check box reads: **A Child Recruitment Plan will not be linked for the following child**.

If you click the information icon, the following message will display:

Checking the box for the listed child below, is an acknowledgment that no recruitment efforts have been made within the Pre-Adoptive Staffing limit of forty-five days. If recruitment efforts have been

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made, then create a Child Recruitment Plan and link it to this pre-adoptive staffing.

1. If you are *not* linking a Child Recruitment Plan, change the status from In Progress to **Complete** using the Status drop-down menu.

The **Manage Pre-Adoptive Staffing** screen appears with a Status of **Complete**, and the Maintain Child Recruitment Plan option is no longer available.

2. Click, **Save**.

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The **Pre-Adoptive Staffing Records** screen appears, displaying the Pre-Adoptive Staffing with a **Status** of **Complete**.

Important: If the Child Recruitment Plan was not started/not created, and a Pre-Adoptive Staffing record has been started, when you click, Maintain Child Recruitment Plan from within the Pre-Adoptive Staffing record; you can add a Recruitment Plan, save it with a status of In Progress, Active, Complete or Closed, and SACWIS will pull the Child Recruitment Plan into the Pre-Adoptive Staffing record. The status of the recruitment plan must be Active, Complete, or Closed before the Pre-Adoptive Staffing can be saved as complete. If you *are* linking a Child Recruitment Plan:

3. Click, **Maintain Child Recruitment Plan** on the **Manage Pre-Adoptive Staffing** screen.

The **Maintain Recruitment Plan** screen appears.

4. Click the **select** link beside the appropriate Child Recruitment Plan.

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The **Manage Pre-Adoptive Staffing** screen appears, displaying the linked recruitment plan in the **Child Recruitment Plan Summary** grid.

> **Note**: If the Child Recruitment Plan is incorrect and you need to remove it, click **unlink** in the **Child Recruitment Plan Summary**.

The **Pre-Adoptive Staffing Narrative Details** screen appears.

5. Add narrative to the text box in the **Pre-Adoptive Staffing Narrative** grid.
   Note: All six (6) topic narratives must be answered to mark the Pre-Adoptive Staffing complete. You can answer the topics in any order.
6. Click, **Next** to navigate through each Pre-Adoptive Staffing Summary topic (you can also use the Previous button for navigation).
7. Once you have finished the narrative for all topics, click, **Save**.

The **Manage Pre-Adoptive Staffing** screen appears, displaying the added narrative.

8. Change the **In Progress** status to **Complete**, using the **Status** drop-down menu.
9. Click, **Save**.

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The **Manage Pre-Adoptive Staffing** screen appears, displaying a **Status** of **Complete**.

Note: If you attempt to mark the Pre-Adoptive Staffing record's Status as Complete when there is an unresolved issue(s), for example, if you leave out required narrative, etc., you will receive a **validation message(s)** telling you what you need to correct to be permitted to mark the record as Complete. See example below:

If you need additional assistance, please contact the SACWIS Help Desk.

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