

Adding Service Review Information

By adding service review information into SACWIS, users can review the comprehensive impact of all services provided by, arranged for, or paid by an agency, including those services not linked to a Case Plan.

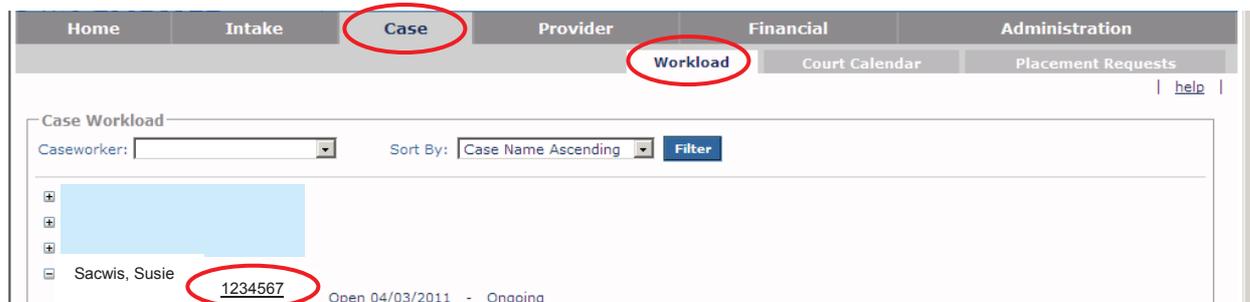
As of October 1, 2012, per Procedure Letter No. 235, PCSAs are required to enter service review information into SACWIS.

This Knowledge Base Article discusses completing a service review within both a case review (3 Month Case Review and SemiAnnual Administrative Review (SAR)) and an Alternative Response (AR) Family Service Review. Each topic is discussed separately below.

Completing a Service Review within a Case Review

1. From the SACWIS **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Select the appropriate **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 **Case Overview** screen or you can use other components of the search functionality to locate the case.



The **Case Overview** screen appears.

Adding Service Review Information

- Click the **Case Review/SAR** link in the **Navigation** menu.



The **Case Review/SAR Filter Criteria** screen appears displaying the **Case Review(s)/SAR(s)** section below it.

- Click the **Edit** link in the appropriate row.

The screenshot shows a table titled 'Case Review(s)/SAR(s)' with 'Result(s) 1 to 9 of 9' and 'Page 1 of 1'. The table has columns for 'Case Review Type', 'Status', 'Approved Date', 'Case Plan#', and 'Agency'. The 'edit' link in the first row is circled in red.

	Case Review Type	Status	Approved Date	Case Plan#	Agency	
edit	Case Review - Optional	In progress		2.00		delete
view reports	3 Month Case Review	Approved	11/06/2012	2.00		
view reports	Semiannual Administrative Review	Approved	08/02/2012	2.00		

The **Case Review Topics** screen appears.

- Click the **Service Review** link.

The screenshot shows the 'Case Review Topics' screen. At the top, it displays 'Case Review Type: Semiannual Administrative Review', 'Review for Case Plan Number: 2.00', and 'Status: In progress'. Below is a table with 'Topic' and 'Status' columns. The 'Service Review' link is circled in red.

Topic	Status
Identifying Information	Completed
Safety Review	Not Provided
Service Review	Progress Provided for 0 of 3 Risk Contributors
Strength and Needs Update	Not Completed
Risk Reassessment	Not Completed
Custody/PSUP/In-Home Supportive Services	Not Provided
Permanency Information	Not Provided
Permanency Goals	Progress Provided for 0 of 3 Children
Signature/Notice Information	0 Signatures(s) Provided
Case Analysis	Not Completed

The **Service Review Information** screen appears.

Adding Service Review Information

Completing the Current Case Plan Services Tab

1. On the **Current Case Plan Services** tab, click the **Edit Progress** link in the appropriate row.

The screenshot shows a web application interface with three tabs: 'Current Case Plan Services', 'Prior Case Plan Unlinked Services', and 'Services Not linked to Case Plan'. The 'Current Case Plan Services' tab is active. Below the tabs, there are fields for Case ID, Case Name, Case Status (Open), and Case Category (Ongoing). Below these are fields for Case Review Type (Semiannual Administrative Review), Review for Case Plan Number, and Status (In progress). A section titled 'Service Review Information' contains a table with columns: Name(s), Risk Contributors, and Progress Addressing Concerns. A row in the table has 'Services' in the Name(s) column and 'Self Protection Physical/Cognitive/Social Development' in the Risk Contributors column. The 'edit_progress' link in the first column of this row is circled in red.

The **Services Details** screen appears.

2. Complete the **narrative** field.
3. In the **Progress Addressing Concern** field, select the appropriate reference value from the drop-down list.
4. Click the **Save** button.

The screenshot shows the 'Services Details' screen. It has fields for Case Plan Participant and Risk Contributor. Below these are three checkboxes: 'What are the Concerns?', 'What behavior will need to change to reduce risk and address safety issues of the child(ren)?', and 'What activities do family members need to do to make this change?'. A large text area labeled 'narrative' is highlighted with a red box, along with a 'Progress Addressing Concern' dropdown menu set to 'Significant Progress'. Below the text area are 'Spell Check' and 'Clear' buttons. At the bottom, the 'Save' button is circled in red.

The **Service Review Information** screen appears displaying a message that your data has been saved.

The screenshot shows the 'Service Review Information' screen. At the top, there is a breadcrumb trail: 'Case > Workload > Case Review/SAR > Case Review Topics > Service Review'. Below this is a navigation bar with three tabs: 'Current Case Plan Services', 'Prior Case Plan Unlinked Services', and 'Services Not linked to Case Plan'. The 'Current Case Plan Services' tab is active. A message box at the bottom of the screen says 'Your data has been saved.' and has a 'close confirmation' button.

Adding Service Review Information

Adding Service Review Detail Information

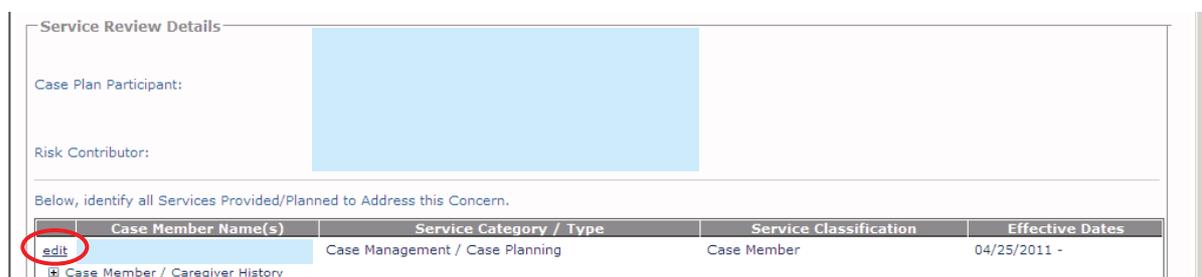
1. On the **Current Case Plan Services** tab, **Service Review Information** section, click the **Services** link in the appropriate row.

Important: To approve the **Case Review** work item, a service review must be completed for every service that is not end-dated. The service review date must fall within the current Case Review period. However, at this time it is not required that either the **Prior Case Plan Unlinked Services** tab or the **Services Not Linked to Case Plan** tab be completed.



The **Service Review Details** screen appears.

2. Click the **Edit** link in the appropriate row.



The **Service Information** screen appears.

3. Click the **Service Review** tab.



The **Service Review** screen appears.

Adding Service Review Information

4. Click the **Add Service Review** button.

The screenshot shows a web interface with three tabs: Service Information, Service Review, and Service Activity. Under Service Information, there are fields for Case ID, Case Name, and Service Category. Under Service Activity, there are fields for Case Status (Open), Case Category (Ongoing), and Service Type (Case Planning). Below these is a table with columns for Case Member(s) / DOB and Review Date. A 'view' link is visible next to a row in the table. A blue button labeled 'Add Service Review' is located below the table and is circled in red.

The **Service/Activity Review Details** screen appears.

5. In the **Review Date** field, verify the date is correct.

Note: The **Review Date** field populates with the current date, but can be changed to a prior date.

6. In the grid, click the check box next to the appropriate case member.
7. In the **Service Recommendation** field (mandatory), select the appropriate choice from the drop-down list.

The screenshot shows the 'Service/Activity Review Details' screen. At the top, there is a 'Review Information' section with a 'Review Date' field set to 12/22/2011. Below this is a table with columns for Case Member(s) / DOB, Service Recommendation, and Barrier Type. A checkmark is visible in the first column of the table, and a dropdown menu is open for the Service Recommendation field, showing options: Continue, Modify, and Terminate. Both the Review Date field and the Service Recommendation dropdown are highlighted with red boxes.

8. As shown below, if a barrier exists, select the appropriate type in the **Barrier Type** field.
9. If a **Barrier Type** is selected, complete the **Barrier Comments** field (required).

Adding Service Review Information

10. If needed, complete the **Recommendation Comments** field (not required).
11. Click the **Save** button.

Service/Activity Review Details

Review Information

Review Date: 12/22/2011

Case Member(s) / DOB	Service Recommendation	Barrier Type
<input checked="" type="checkbox"/>	Continue	<ul style="list-style-type: none">Child CareTIMEFRAME TOO SHORTTOO EXPENSIVENOT FREQUENT ENOUGHSRVNOTMEET NEEDNO SLOTS AVAILABLEINCONVENIENT PLACEChild care needs prevent use of servicesClient RefusalClient Schedule ConflictCost prohibitiveCourt Ordered Different ServicesEligibility ExclusionFrequent Worker TurnoverFurther Assessment NeededInability to Place Sibling GroupInsufficient Service QualityInsufficient Service QuantityLack of fundingLack of resourceLack of TransportationLanguage BarrierMore intensive services needed that is not available/provided

Recommendation Comments:

Barrier Comments:

Save Cancel

The **Service Review** screen appears displaying a message that your data has been saved.

12. Click the **Save** button.

Your data has been saved [close confirmation](#)

Case > Workload > Case Services

Service Information	Service Review	Service Activity
Case ID: [redacted] Case Name: [redacted] Service Category: [redacted]		Case Status: Open Case Category: Ongoing Service Type: Case Planning

Service Review

	Case Member(s) / DOB	Review Date	
edit	[redacted]	12/22/2011	delete
view	[redacted]	10/06/2011	

Add Service Review

Apply Save Cancel

The **Service Review Details** screen appears displaying a message that your data has been saved.

Adding Service Review Information

13. Click the **Close** button.

Case > Workload > Case Review/SAR > Case Review Topics > Service Review > Service Review Details

Your data has been saved. [close_confirmation](#)

Case ID: [redacted] Case Status: Open
Case Name: [redacted] Case Category: Ongoing

Case Review Type: Semiannual Administrative Review Review for Case Plan Number: [redacted] Status: In progress

Service Review Details

Case Plan Participant: [redacted]

Risk Contributor: [redacted]

Below, identify all Services Provided/Planned to Address this Concern.

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates
edit	[redacted]	Case Management / Case Planning	Case Member	04/25/2011 -
edit	[redacted]	Case Management / Case Planning	Case Member	04/25/2011 -
edit	[redacted]	Case Management / Case Planning	Caregiver	04/25/2011 -
edit	[redacted]	Case Management / Case Planning	Caregiver	04/25/2011 -
edit	[redacted]	Case Management / Case Planning	Caregiver	04/25/2011 -

[Close](#)

The **Service Review Information** screen appears.

Completing the Prior Case Plan Unlinked Services Tab

1. Click the **Prior Case Plan Unlink Services** tab.
2. Click the **Edit Progress** link in the appropriate row.

Current Case Plan Services **Prior Case Plan Unlinked Services** Services Not linked to Case Plan

Case ID: [redacted] Case Status: [redacted]
Case Name: [redacted] Case Category: [redacted]

Case Review Type: Semiannual Administrative Review Review for Case Plan Number: [redacted] Status: In progress

Service Review Information

Concerns

	Name(s)	Risk Contributors	Progress Addressing Concerns
Services unlinked from Case Plan 1.05			
edit_progress	[redacted]	Emotional/Mental Health Functioning	Some Progress
Services unlinked from Case Plan 1.04			
edit_progress	[redacted]	Emotional/Mental Health Functioning	Some Progress

The **Services Details** screen appears. The concern that displays for the service (**Progress Addressing Concerns** column shown in gold) will be the concern from which the case service was last linked.

Adding Service Review Information

3. Complete the **Narrative** field.
4. In the **Progress Addressing Concern** field, select the appropriate reference value from the drop-down list.
5. When complete, click the **Save** button.

Services Details

Case Plan Participant: [Redacted]

Risk Contributor: [Redacted]

What are the Concerns?

What behavior will need to change to reduce risk and address safety issues of the child(ren)?

What activities do family members need to do to make this change?

Discuss the impact toward addressing safety, risk, permanency and/or child well-being issues in detail. If applicable, include any existing barriers to services. *

test

Spell Check Clear 4000

Progress Addressing Concern: * Significant Progress

Apply Save Cancel

The **Service Review Information** screen appears displaying a message that your data has been saved.

Adding Service Review Detail Information

1. On the **Prior Case Plan Unlinked Services** tab, **Service Review Information** section, click the **Services** link in the appropriate row.

Important: To approve the **Case Review** work item, a service review must be completed for every service that is not end-dated. The service review date must fall within the current Case Review period. However, at this time it is not required that either the **Prior Case Plan Unlinked Services** tab or the **Services Not Linked to Case Plan** tab be completed.

Current Case Plan Services Prior Case Plan Unlinked Services Services Not linked to Case Plan

Your data has been saved. [close confirmation](#)

Case ID: [Redacted] Case Status: [Redacted]

Case Name: [Redacted] Case Category: Ongoing

Case Review Type: Semiannual Administrative Review Review for Case Plan Number: [Redacted] Status: In progress

Service Review Information

Concerns

Name(s)	Risk Contributors	Progress Addressing Concerns
Services unlinked from [Redacted]	Emotional/Mental Health Functioning	Significant Progress

[edit progress](#) [services](#)

The **Service Review Details** screen appears.

Adding Service Review Information

2. Click the **Edit** link in the appropriate row.

Service Review Details

Case Plan Participant: [Redacted]
Risk Contributor: [Redacted]

Below, identify all Services Provided/Planned to Address this Concern.

Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates
edit [Redacted]	Counseling / Individual counseling	Case Member	10/01/2008 -

[Case Member / Caregiver History](#)

[Close](#)

The **Service Information** screen appears.

3. Click the **Service Review** tab.

Case > Workload > Case Services

Service Information **Service Review** Service Activity

Case ID: [Redacted] Case Status: [Redacted]
Case Name: [Redacted] Case Category: Ongoing

Service Information

Agency: [Redacted]
Risk Contributors: [Redacted]

The **Service Review** screen appears.

4. Click the **Add Service Review** button.

Service Information **Service Review** Service Activity

Case ID: [Redacted] Case Status: [Redacted]
Case Name: [Redacted] Case Category: Ongoing
Service Category: [Redacted] Service Type: Individual counseling

Service Review

Case Member(s) / DOB	Review Date	
[Redacted]	12/22/2011	delete
[Redacted]	07/01/2010	
[Redacted]	01/26/2010	
[Redacted]	10/21/2009	
[Redacted]	07/24/2009	
[Redacted]	04/03/2009	
[Redacted]	01/20/2009	
[Redacted]	10/22/2008	
[Redacted]	10/22/2008	

[Add Service Review](#)

The **Service/Activity Review Date** screen appears.

Adding Service Review Information

5. In the **Review Date** field, verify the date is correct.

Note: The **Review Date** field populates with the current date, but can be changed to a prior date.

6. Click the check box next to the appropriate case member.
7. In the **Service Recommendation** field (mandatory), select the appropriate choice from the drop-down list.

The screenshot shows the 'Service/Activity Review Details' form. The 'Review Information' section at the top has a 'Review Date' field set to 12/23/2011. Below this is a table with columns for 'Case Member(s) / DOB', 'Service Recommendation', and 'Barrier Type'. A red box highlights the 'Review Date' field. Another red box highlights the 'Service Recommendation' dropdown menu, which is open and shows options: 'Continue', 'Modify', and 'Terminate'. A third red box highlights the checkmark in the first row of the table.

8. If a barrier exists, select the appropriate type in the **Barrier Type** field.
9. If a **Barrier Type** is selected, complete the **Barrier Comments** field (required).
10. If needed, complete the **Recommendation Comments** field (not required).
11. Click the **Save** button.

This screenshot shows the same form as the previous one, but with more fields highlighted. The 'Barrier Type' dropdown menu is open, showing a list of barrier types such as 'Child Care', 'TIMEFRAME TOO SHORT', 'TOO EXPENSIVE', etc. Red boxes highlight the 'Recommendation Comments' field, the 'Barrier Comments' field, and the 'Save' button at the bottom left of the form.

The **Service Review** screen appears displaying a message that your data has been saved.

Adding Service Review Information

12. Click the **Save** button.

The screenshot shows a web application interface with a blue header bar containing the message "Your data has been saved" and a "close confirmation" link. Below the header, the breadcrumb "Case > Workload > Case Services" is visible. The main content area is divided into three tabs: "Service Information", "Service Review", and "Service Activity". The "Service Review" tab is active, displaying a table with columns for "Case Member(s) / DOB" and "Review Date". The table contains several rows of data, each with "edit" and "delete" links. Below the table is an "Add Service Review" button. At the bottom of the screen, there are three buttons: "Apply", "Save", and "Cancel". The "Save" button is circled in red.

The **Service Review Details** screen appears displaying a message that your data has been saved.

13. Click the **Close** button.

The screenshot shows a web application interface with a blue header bar containing the message "Your data has been saved" and a "close confirmation" link. Below the header, the breadcrumb "Case > Workload > Case Services" is visible. The main content area is divided into three tabs: "Service Information", "Service Review", and "Service Activity". The "Service Review" tab is active, displaying a "Service Review Details" section. This section includes fields for "Case ID", "Case Name", "Case Status", "Case Category", "Case Review Type", "Review for Case Plan Number", and "Status". Below these fields is a "Service Review Details" section with "Case Plan Participant" and "Risk Contributor" fields. A message states "Below, identify all Services Provided/Planned to Address this Concern." Below this message is a table with columns for "Case Member Name(s)", "Service Category / Type", "Service Classification", and "Effective Dates". The table contains one row of data. Below the table is a "Case Member / Caregiver History" checkbox. At the bottom of the screen, there is a "Close" button circled in red.

The **Service Review Information** screen appears.

Adding Service Review Information

Completing the Services Not Linked to Case Plan Tab

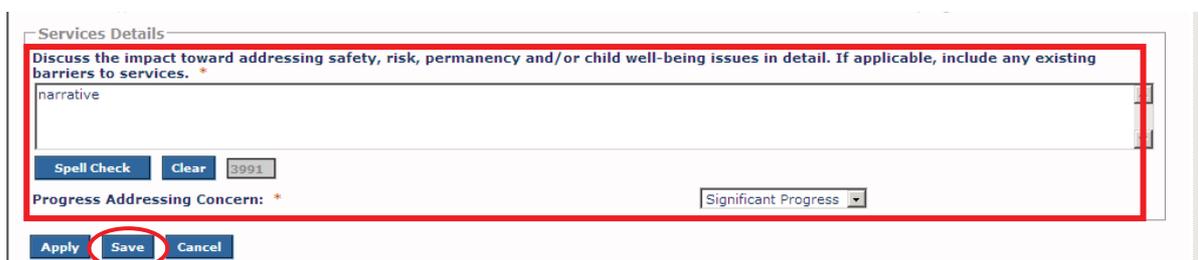
1. Click the **Services Not Linked to Case Plan** tab.
2. Click the **Edit Progress** button.



The screenshot shows a software interface with three tabs: 'Current Case Plan Services', 'Prior Case Plan Unlinked Services', and 'Services Not linked to Case Plan'. The 'Services Not linked to Case Plan' tab is selected and highlighted with a red box. Below the tabs, there are fields for 'Case ID:', 'Case Name:', 'Case Status:', and 'Case Category:'. The 'Case Status' is 'Ongoing'. Below these are 'Case Review Type: Semiannual Administrative Review', 'Review for Case Plan Number:', and 'Status: In progress'. A section titled 'Service Review Information' contains a text area with the instruction: 'Discuss the impact toward addressing safety, risk, permanency and/or child well-being issues in detail. If applicable, include any existing barriers to services.' Below this is a 'Progress Addressing Concern:' dropdown menu. The 'Edit Progress' button is circled in red.

The **Service Details** screen appears.

3. Complete the **Narrative** field.
4. In the **Progress Addressing Concern** field, select the appropriate reference value from the drop-down list.
5. Click the **Save** button.



The screenshot shows the 'Services Details' screen. It features a text area for 'Narrative' with the instruction: 'Discuss the impact toward addressing safety, risk, permanency and/or child well-being issues in detail. If applicable, include any existing barriers to services.' Below the text area are 'Spell Check' and 'Clear' buttons, and a '3991' field. Below these is a 'Progress Addressing Concern:' dropdown menu with 'Significant Progress' selected. At the bottom, there are 'Apply', 'Save', and 'Cancel' buttons. The 'Save' button is circled in red.

The **Services Not Linked to Case Plan** tab appears (**Service Review Information** screen) displaying a message that your data has been saved.

Adding Service Review Information

6. Click the **Edit** link in the appropriate row.

Current Case Plan Services | Prior Case Plan Unlinked Services | Services Not linked to Case Plan

Your data has been saved. [close confirmation](#)

Case ID: [redacted] Case Status: [redacted]
Case Name: [redacted] Case Category: Ongoing

Case Review Type: Semiannual Administrative Review | Review for Case Plan Number: [redacted] | Status: In progress

Service Review Information

Discuss the impact toward addressing safety, risk, permanency and/or child well-being issues in detail. If applicable, include any existing barriers to services narrative

Progress Addressing Concern: Significant Progress

[Edit Progress](#)

Services that are not linked to Case Plan but Active (or) end-dated during the current review period.

Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates
[redacted]	Emergency / Emergency Caretaker Services	Case Member	11/01/2007 -

[edit](#)

[Case Member / Caregiver History](#)

The **Service Information** screen appears.

7. Click the **Service Review** tab.

8. Click the **Add Service Review** button.

Case > Workload > Case Services

Service Information | **Service Review** | Service Activity

Case ID: [redacted] Case Status: Open [redacted]
Case Name: [redacted] Case Category: Ongoing
Service Category: [redacted] Service Type: Emergency Caretaker Services

Service Review

Case Member(s) / DOB	Review Date
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[Add Service Review](#)

The **Service/Activity Review Date** screen appears.

Adding Service Review Information

9. In the **Review Date** field, verify the date is correct.

Note: The **Review Date** field populates with the current date, but can be changed to a prior date.

1. Click the check box next to the appropriate case member.
2. In the **Service Recommendation** field (mandatory), select the appropriate choice from the drop-down list.

The screenshot shows the 'Service/Activity Review Details' form. At the top, there are fields for Case ID, Case Name, Service Category, Case Status (Ongoing), Case Category, and Service Type (Emergency Caretaker Services). Below this is the 'Review Information' section, which includes a 'Review Date' field set to 12/23/2011. A table below has columns for 'Case Member(s) / DOB', 'Service Recommendation', and 'Barrier Type'. The first row has a checked checkbox in the first column and a dropdown menu in the second column. The dropdown menu is open, showing options: 'Continue', 'Modify', and 'Terminate'. A 'Recommendation Comments' field is visible below the table.

3. If a barrier exists, select the appropriate type in the **Barrier Type** field.
4. If a **Barrier Type** is selected, complete the **Barrier Comments** field (required).
5. If needed, complete the **Recommendation Comments** field (not required).
6. Click the **Save** button.

This screenshot shows the same form as the previous one, but with the 'Barrier Type' dropdown menu open. The dropdown menu lists various barrier types such as 'Child Care TIMEFRAME TOO SHORT', 'TOO EXPENSIVE', 'NOT FREQUENT ENOUGH', 'SRVNOTMEET NEED', 'NO SLOTS AVAILABLE', 'INCONVENIENT PLACE', 'Child care needs prevent use of services', 'Client Refusal', 'Client Schedule Conflict', 'Cost prohibitive', 'Court Ordered Different Services', 'Eligibility Exclusion', 'Frequent Worker Turnover', 'Further Assessment Needed', 'Inability to Place Sibling Group', 'Insufficient Service Quality', 'Insufficient Service Quality', 'Lack of funding', 'Lack of resource', 'Lack of Transportation', 'Language Barrier', and 'More intensive services needed that is not available/provided'. The 'Recommendation Comments' and 'Barrier Comments' fields are highlighted with red boxes. At the bottom, there are 'Save' and 'Cancel' buttons, with the 'Save' button also highlighted with a red circle.

The **Service Review** screen appears displaying a message that your data has been saved.

Adding Service Review Information

7. Click the **Save** button again.

The screenshot shows a web application interface for 'Case Services'. At the top, a blue banner displays 'Your data has been saved' with a 'close confirmation' link. Below this, the breadcrumb 'Case > Workload > Case Services' is visible. The main content area is divided into three tabs: 'Service Information', 'Service Review', and 'Service Activity'. The 'Service Review' tab is active, showing a table with one entry for a service review on 12/23/2011. Below the table is an 'Add Service Review' button. At the bottom of the screen, there are three buttons: 'Apply', 'Save' (circled in red), and 'Cancel'.

The **Service Review Information** screen appears displaying a message that your data has been saved.

8. Click the **Close** button at the bottom of the screen.

The screenshot shows a web application interface for 'Case Review Topics'. At the top, a blue banner displays 'Your data has been saved' with a 'close confirmation' link. Below this, the breadcrumb 'Case > Workload > Case Services' is visible. The main content area is divided into three tabs: 'Current Case Plan Services', 'Prior Case Plan Unlinked Services', and 'Services Not linked to Case Plan'. The 'Current Case Plan Services' tab is active, showing 'Case Review Type: Semiannual Administrative Review' and 'Status: In progress'. Below this, there is a text area for 'Service Review Information' and a 'Progress Addressing Concern: Significant Progress' section with an 'Edit Progress' button.

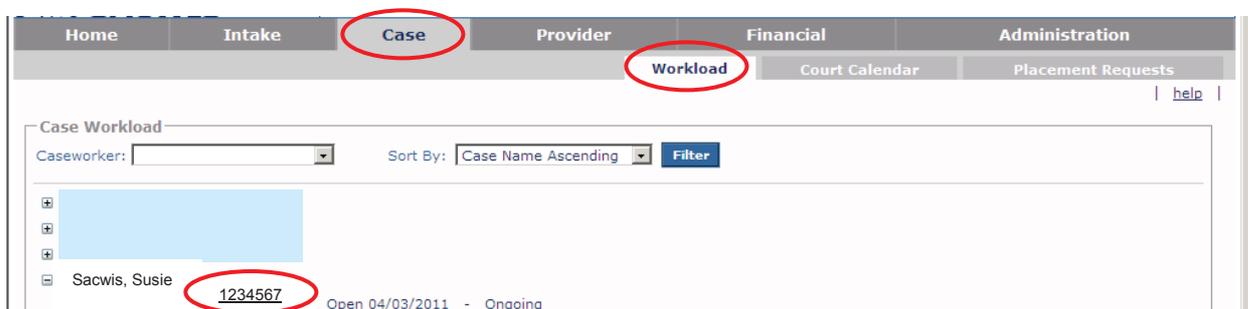
The **Case Review Topics** screen appears.

Adding Service Review Information

Completing a Service Review within an Alternative Response (AR) Family Service Review

1. From the SACWIS **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Select the appropriate **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 **Case Overview** screen.



The **Case Overview** screen appears it.

4. Click the **AR Family Service Review** link in the **Navigation** menu.



The **AR Family Service Review Filter Criteria** screen appears displaying **AR Family Service Review(s)** section below it.

Adding Service Review Information

5. Click the **Add AR Family Service Review** button.

The screenshot shows a web interface for adding service review information. On the left is a navigation menu with links like 'Activity Log', 'Attorney Communication', 'Intake List', 'Safety Assessment', 'Forms/Notices', 'AR Pathway Switch', 'Safety Plan', 'Family Assessment', 'Ongoing Case A/I', 'Specialized A/I Tool', 'Law Enforcement', 'Justification/Waiver', 'Case Services', 'Court', and 'Initial Removal'. The main area is titled 'AR Family Service Review Filter Criteria' and contains several input fields: 'Review Type', 'Status', 'From Approved Date', 'To Approved Date', 'Agency', and 'Sort Results By'. Below these fields are 'Filter' and 'Clear Form' buttons. At the bottom, there is a section for 'AR Family Service Review(s)' showing 'Result(s) 0' and 'Page 0 of 0'. A blue button labeled 'Add AR Family Service Review' is highlighted with a red rectangular box.

The **Identifying Information** screen appears.

Completing the Identifying Information Screen

1. In the **Reason for Family Service Plan Review** field, select the appropriate value from the drop-down list.
2. In the **Family Service Plan being Reviewed** field, enter the appropriate content.
3. Click the **Select Available Family Service Plan(s)** link.

The screenshot shows the 'Identifying Information' form. It includes a 'Date of Family Service Plan Review' field with a date picker set to 12/01/2011. The 'Reason for Family Service Plan Review' field is a dropdown menu currently showing '90 Day Review' and is highlighted with a red box. Below it is a text area for 'If Other, Explain:'. There are 'Spell Check', 'Clear', and '200' characters remaining buttons. The 'Family Service Plan being Reviewed' field is highlighted with a red box and contains a link that says '[Select Available Family Service Plan(s)]'. To the right is a 'Date of Agreed Upon Services' field with a dropdown and an information icon. At the bottom, there is a section for 'Child(ren) Participating in the AR Family Service Plan Review' with a table header showing 'Name' and 'DOB'.

The **Available Family Service Plan to be Reviewed** screen appears.

Adding Service Review Information

4. Select appropriate radio button.
5. Click the **OK** button.

Available Family Service Plans to be Reviewed

Type	Plan Number:	Status	Approved Date
<input checked="" type="radio"/> INITIAL	1.00	Approved	11/07/2011

OK **Cancel**

The **Family Service Plan Review Topics** screen appears displaying a message that your data has been saved as shown below.

6. Click the **Service / Concern Review** link.

Your data has been saved. [close confirmation](#)

Case > Workload > AR Family Service Plan Review

Case ID: [redacted] Case Status: Open
Case Name: [redacted] Case Category: Alternative Response Ongoing

Family Service Plan Review Topics
Family Service Plan Review Type: 90 Day Review Review for Family Service Plan Number: 1.00 Status: In progress

Topic	Status
Identifying Information	Completed
Safety Review	Not Completed
Service / Concern Review	Not Completed
Risk Reassessment	Not Completed
Case Status	Not Completed
Signature Details	0 Signatures(s) Provided

Validate for Approval **Process for Approval**

Close

The **Concern Review** screen appears.

Adding Service Review Information

7. Complete the narrative fields.
8. Click the **Service Review** button near the bottom of the screen.

Concern Review

View Concerns Documented for the Family Service Plan

What are the current service plan activities and services? Discuss the progress of each.

Spell Check
Clear
4000

Are there any new concerns to address in the Family Service Plan?:

Spell Check
Clear
2000

Are there any activities and/or services that will address these concerns that should be included in the Family Service Plan?:

Spell Check
Clear
2000

Are there any other ways that we can better meet your needs?:

Spell Check
Clear
2000

Service Review

Apply
Save
Cancel

The **Service Review Information** screen appears.

Completing the Current AR Family Service Plan Services Tab

1. On the **Current AR Family Service Plan Services** tab, **Service Review Information** section, click the **Services** link in the appropriate row.

Current AR Family Service Plan Services	Prior AR Family Service Plan Unlinked Services	Services Not linked to AR Family Service Plan				
Case ID: [redacted]		Case Status: Open				
Case Name: [redacted]		Case Category: Alternative Response Ongoing				
Family Service Plan Review Type: 90 Day Review		Review for Family Service Plan Number: [redacted] Status: Approved				
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Service Review Information</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #f2f2f2;"> <th style="width: 50%;">Name(s)</th> <th style="width: 50%;">Concern(s)</th> </tr> </thead> <tbody> <tr> <td style="border: 2px solid red;">services</td> <td>No job.</td> </tr> </tbody> </table> </div>			Name(s)	Concern(s)	services	No job.
Name(s)	Concern(s)					
services	No job.					

The **Service Review Details** screen appears.

Adding Service Review Information

2. Click the **Edit** link in the appropriate row.

Service Review Details

Family Service Plan Participant: [Redacted]

Concern: [Redacted]

Below, identify all Services Provided/Planned to Address this Concern.

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates
edit	[Redacted]	Employment / Job Search	Case Member	10/21/2011 - 11/23/2011

[Case Member / Caregiver History](#)

The **Service Information** screen appears displaying the **Service Information** tab.

3. Click the **Service Review** tab.
4. Click the **Add Service Review** button.

Service Information | **Service Review** | Service Activity

Case ID: [Redacted] Case Status: Open [Redacted]
Case Name: [Redacted] Case Category: Ongoing
Service Category: [Redacted] Service Type: Case Planning

Service Review

	Case Member(s) / DOB	Review Date
edit	[Redacted]	[Redacted]
view		delete

Add Service Review

The **Service/Activity Review Date** screen appears.

5. In the **Review Date** field, verify the date is correct.

Note: The **Review Date** field populates with the current date, but can be changed to a prior date.

6. Click the check box next to the appropriate case member.
7. In the **Service Recommendation** field (mandatory), select the appropriate value from the drop-down list.

Service/Activity Review Details

Review Information

Review Date: 10/31/2011

	Case Member(s) / DOB	Service Recommendation	Barrier Type
<input checked="" type="checkbox"/>	[Redacted]	Continue Modify Terminate	[Redacted]
<input type="checkbox"/>	[Redacted]		[Redacted]
<input type="checkbox"/>	[Redacted]		[Redacted]

Recommendation Comments:

Adding Service Review Information

8. If a barrier exists, select the appropriate type in the **Barrier Type** field.
9. If a **Barrier Type** is selected, complete the **Barrier Comments** field (required).
10. If needed, complete the **Recommendation Comments** field (not required).
11. Click the **Save** button.

Service/Activity Review Details

Review Information

Review Date: 10/31/2011

Case Member(s) / DOB	Service Recommendation	Barrier Type
<input checked="" type="checkbox"/>	Continue	<ul style="list-style-type: none">Child CareTIMEFRAME TOO SHORTTOO EXPENSIVENOT FREQUENT ENOUGHSRVNOTMEET NEEDNO SLOTS AVAILABLEINCONVENIENT PLACEChild care needs prevent use of servicesClient RefusalClient Schedule ConflictCost prohibitiveCourt Ordered Different ServicesEligibility ExclusionFrequent Worker TurnoverFurther Assessment NeededInability to Place Sibling GroupInsufficient Service QualityInsufficient Service QuantityLack of fundingLack of resourceLack of TransportationLanguage BarrierMore intensive services needed that is not available/provided

Recommendation Comments:

Barrier Comments:

Save Cancel

The **Service Review** screen appears displaying a message that your data has been saved.

12. Click the **Save** button.

Your data has been saved [close confirmation](#)

Case > Workload > Case Services

Service Information Service Review Service Activity

Case ID: Case Name: Service Category: Case Status: Ongoing Case Category: Emergency Caretaker Services Service Type: Emergency Caretaker Services

Case Member(s) / DOB	Review Date
	12/23/2011

Add Service Review

Apply Save Cancel

The **Service Review Information** screen appears displaying a message that your data has been saved.

Adding Service Review Information

Completing the Prior AR Family Service Plan Unlinked Services Tab

1. Click the **Prior AR Family Service Plan Unlinked Services** tab.
2. Click the **Edit Progress** button.

Case > Workload > AR Family Service Plan Review > Family Service Plan Review Topics > Service / Concern Review > Service Review

Current AR Family Service Plan Services | **Prior AR Family Service Plan Unlinked Services** | Services Not linked to AR Family Service Plan

Case ID: [redacted] Case Status: Open
Case Name: [redacted] Case Category: Alternative Response Ongoing

Family Service Plan Review Type: Semiannual Administrative Review Review for Family Service Plan Number: [redacted] Status: In progress

Service Review Information

Discuss the impact toward addressing safety, risk, permanency and/or child well-being issues in detail. If applicable, include any existing barriers to services.

Edit Progress

The **Service Details** screen appears.

3. Complete the narrative field.
4. Click the **Save** button.

Family Service Plan Review Type: Semiannual Administrative Review Review for Family Service Plan Number: [redacted] Status: In progress

Services Details

Discuss the impact toward addressing safety, risk, permanency and/or child well-being issues in detail. If applicable, include any existing barriers to services. *

narrative

Spell Check Clear 9991

Apply **Save** Cancel

5. Click the **Edit** link in the appropriate row.

Case ID: [redacted] Case Status: [redacted]
Case Name: [redacted] Case Category: [redacted]

Family Service Plan Review Type: [redacted] Review for Family Service Plan Number: [redacted] Status: In progress

Service Review Details

Family Service Plan Participant: [redacted]

Concern: [redacted]

Below, identify all Services Provided/Planned to Address this Concern.

Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates
edit [redacted]	Case Management / Information & Referral Services	Case Member	10/07/2011 -
[redacted]	Case Management / Case Management Services	Case Member	10/07/2011 -

[redacted] Case Member / Caregiver History

The **Service/Activity Review Date** screen appears.

Adding Service Review Information

6. Click the **Service Review** tab.
7. Click the **Add Service Review** button.

The screenshot shows a web application interface with three tabs: "Service Information", "Service Review" (highlighted with a red box), and "Service Activity". Under "Service Information", there are fields for Case ID, Case Name, and Service Category. Under "Service Activity", there are fields for Case Status (Open), Case Category (Ongoing), and Service Type (Case Planning). Below these is a "Service Review" section with a table header "Case Member(s) / DOB" and "Review Date". The table has a "delete" link. At the bottom, there is a blue button labeled "Add Service Review" which is circled in red.

The **Service/Activity Review Date** screen appears.

8. In the **Review Date** field, verify the date is correct.

Note: The **Review Date** field populates with the current date, but can be changed to a prior date.

9. Click the check box next to the appropriate case member.
10. In the **Service Recommendation** field (mandatory), select the appropriate value from the drop-down list.

The screenshot shows the "Service/Activity Review Details" screen. It has a "Review Information" section with a "Review Date" field set to 10/31/2011. Below is a table with columns "Case Member(s) / DOB", "Service Recommendation", and "Barrier Type". The first row has a checked checkbox in the "Case Member(s) / DOB" column and a dropdown menu in the "Service Recommendation" column with options "Continue", "Modify", and "Terminate". The "Barrier Type" column has a dropdown menu. At the bottom, there is a "Recommendation Comments" field.

Adding Service Review Information

11. If a barrier exists, select the appropriate type in the **Barrier Type** field.
12. If a **Barrier Type** is selected, complete the **Barrier Comments** field (required).
13. If needed, complete the **Recommendation Comments** field (not required).
14. Click the **Save** button.

Service/Activity Review Details

Review Information

Review Date: 10/31/2011

Case Member(s) / DOB	Service Recommendation	Barrier Type
<input checked="" type="checkbox"/>	Continue	<ul style="list-style-type: none">Child CareTIMEFRAME TOO SHORTTOO EXPENSIVENOT FREQUENT ENOUGHSRVNOTMEET NEEDNO SLOTS AVAILABLEINCONVENIENT PLACEChild care needs prevent use of servicesClient RefusalClient Schedule ConflictCost prohibitiveCourt Ordered Different ServicesEligibility ExclusionFrequent Worker TurnoverFurther Assessment NeededInability to Place Sibling GroupInsufficient Service QualityInsufficient Service QuantityLack of fundingLack of resourceLack of TransportationLanguage BarrierMore intensive services needed that is not available/provided

Recommendation Comments:

Barrier Comments:

Spell Check Clear 2000

Save Cancel

The **Service Review** screen appears displaying a message that your data has been saved.

Completing the Services Not Linking to AR Family Service Plan Tab

1. Click the **Services Not Linked to Case Plan** tab.
2. Click the **Edit Progress** button.

Current AR Family Service Plan Services | Prior AR Family Service Plan Unlinked Services | **Services Not linked to AR Family Service Plan**

Case ID: [redacted] Case Status: Open
Case Name: [redacted] Case Category: Alternative response ongoing

Family Service Plan Review Type: Semiannual Administrative Review | Review for Family Service Plan Number: [redacted] | Status: In progress

Service Review Information

Discuss the impact toward addressing safety, risk, permanency and/or child well-being issues in detail. If applicable, include any existing barriers to services.

Edit Progress

Services that are not linked to AR Family Service Plan but Active (or) end-dated during the current review period.

The **Service Details** screen appears.

Adding Service Review Information

3. Complete the narrative field.
4. Click the **Save** button.

Case Review Type: Semiannual Administrative Review Review for Case Plan Number: [] Status: In progress

Services Details

Discuss the impact toward addressing safety, risk, permanency and/or child well-being issues in detail. If applicable, include any existing barriers to services. *

narrative

Spell Check Clear 3991

Apply **Save** Cancel

The **Services Not Linked to Case Plan** appears.

5. When complete, click the **Save** button again.

Service/Activity Review Details

Review Information

Review Date: * 12/28/2011

	Case Member(s) / DOB	Service Recommendation	Barrier Type
<input checked="" type="checkbox"/>	[]	Modify	[]
<input checked="" type="checkbox"/>	[]	Continue	[]

Recommendation Comments:

test

Spell Check Clear 1996

Barrier Comments:

Spell Check Clear 2000

Save Cancel

The **Service Review Information** screen appears.