

Completing a Case Review



Knowledge Base Article

Completing a Case Review

Table of Contents

Overview	3
Completing a Case Review.....	4
Completing the Members to the Review Topic	5
Adding Household Members.....	9
Completing the Safety Reassessment Topic	10
Completing the Safety Factors Tab.....	11
Completing the Child Vulnerability Tab.....	12
Completing the Adult Protective Capacity Tab	14
Completing the Safety Response Tab	15
Completing the Strengths and Needs Topic	17
Completing the Child Functioning Tab.....	18
Completing the Adult Functioning Tab.....	19
Completing the Family Functioning Tab	20
Completing the Historical Functioning Tab	21
Completing the Concern Review Topic.....	23
Completing the Visitation Topic.....	27
Completing the Adult Visitation Tab	27
Completing the Sibling Visitation Tab	30
Completing the Risk Reassessment Topic	33
Completing the Case Analysis Topic	34
Completing the Approval Topic	36

Completing a Case Review

Overview

This article provides step-by-step instruction for completing a Case Review.

Each **Case Review Topic** listed will maintain a status of **Not Completed** until you have provided all required information. Once you have provided the required information, the topic will display a status of **Completed**.

Important: It is not necessary to click, Next Topic, and proceed through the topics in order. Using the Next Topic and Previous Topic buttons allows you to move between adjacent topics; however, you can click any topic to work on during the completion of the case review. Regardless of how you navigate the Topics, Ohio SACWIS will save your changes. For the purposes of this article, using the Next Topic button will be used for navigation.

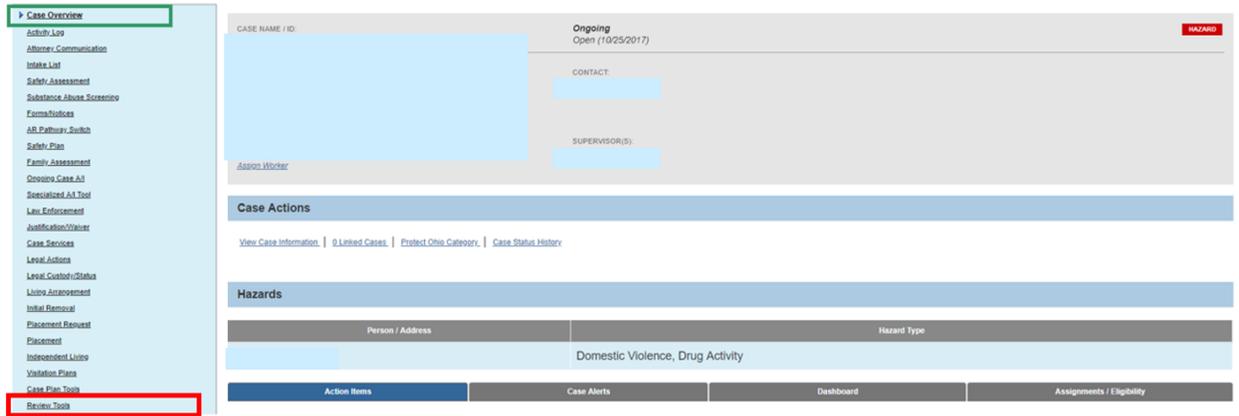
Topics will display based on the child(ren's) legal status recording in Ohio SACWIS.

Members to the Review (MR)	Displays on all Case Reviews
Safety Reassessment	Does NOT display on Case Reviews where the following are true: All plan participants have a Legal Status of Permanent Custody or Permanent Surrender.
Strengths and Needs Assessment	Displays on all Case Reviews
Concern Review	Displays on Case Reviews
Visitation	Displays on all Case Reviews
Risk Reassessment	Displays when there is a screened in CA/N Intake linked during the current case episode, OR Does not display Case Reviews where all child plan participant(s) have a Legal Status of Permanent Custody or Permanent Surrender.

From the Ohio SACWIS Home Page:

1. Navigate to the **Case Overview** screen.
2. Click, **Review Tools** in the navigation pane.

Completing a Case Review



The **Review Tools** screen appears.

Completing a Case Review

1. In the **Review Tools** grid, select **Family Case Plan** from the **Plan Type** drop-down menu.
2. Make a selection from the **Review Tool** drop-down menu.
3. Click, **Add Review**.

Completing a Case Review

Review Tools Filter Criteria

Review Tool: Agency:

Approved Date: -
From Date To Date

Review Tools

Plan Type: Review Tool: [Add Review](#)

	Review Tool	Status	Approved Date	Plan Name	Agency	
edit	Case Review	In Progress		Updated Sept 9, 2016	[Redacted Agency]	
view	Semiannual Administrative Review	Approved	06/19/2016	Initial Mar 9, 2016		
view	AR Family Service Review	Approved	06/19/2016	Initial Mar 9, 2016		

Plan Type: Review Tool: [Add Review](#)

The **Members to the Review** page appears.

Completing the Members to the Review Topic

1. Click, **Select Family Case Plan**.

Completing a Case Review

Case / Workload / Case Review **Members to the Review**

CASE NAME / ID: **Doe, Jane / 00000000 [R]** **Ongoing / Open (01/01/2014)**

REVIEW TOOL: **Case Review** REVIEW FOR PLAN: **Initial Sept 22, 2016** STATUS: **In Progress**

Case Review Topics < **Family Case Plan Information**

Members to the Review (MR) **Completed**

Safety Reassessment (SR) **Not Completed**

Strengths and Needs Assessment (SN) **Not Completed**

Concern Review (CR) **Not Completed**

Visitation (V) **Not Completed**

Risk Reassessment (RR) **Not Completed**

Case Analysis (CA) **Not Completed**

Approval (A)

No Family Case Plan has been selected.

Select Family Case Plan

The **Available Family Case Plans** grid appears.

1. Click, **select**, beside the relevant Family Case Plan.

Case / Workload / Case Review / Members to the Review / Select Alternative Plan

Select Alternative Plan

CASE NAME / ID: **[Redacted]** **Ongoing / Open (12/00/2016)**

REVIEW TOOL: **Case Review** REVIEW FOR PLAN: **[Redacted]** STATUS: **In progress**

Available Family Case Plans

	Plan Name	Event Date	Plan Type	Effective Date	Agency
select	Initial May 22, 2019	02/20/2019-Ex-Parte	Family Case Plan Status: Approved	05/22/2019 - Approved	[Redacted]

The **Members to the Review** screen appears, displaying information regarding the Family Case Plan, as well as the Children and the Adults who are part of the case review.

Note: You can click the **Relationships** button to view/edit the relationships of the members to each other.

1. If necessary, click **Add New Household Member** in the **New Household Members** grid.

Completing a Case Review

Enter narrative in response to: **Describe how the adults and child(ren) listed above impact family functioning, safety, well-being, and permanency. Describe family interactions.**

2. In the **Family Dynamics** grid, enter narrative in response to: **Describe family interactions and new life events since the last assessment.**
3. Click, **Next Topic** or select any topic within the Case Review.

Important: If it is necessary to add a household member(s), see section below titled, **Adding Household Members.**

Completing a Case Review

Case / Workload / Case Review **Members to the Review**

CASE NAME / ID: **Doe, Jane / 000000000 [R]** Ongoing / Open (01/01/2014)

REVIEW TOOL: Case Review REVIEW FOR PLAN: Initial Sept 22, 2016 STATUS: In Progress

Case Review Topics

- Members to the Review** (MR) Completed
- Safety Reassessment (SR) Not Completed
- Strengths and Needs Assessment (SN) Not Completed
- Concern Review (CR) Not Completed
- Visitation (V) Not Completed
- Risk Reassessment (RR) Not Completed
- Case Analysis (CA) Not Completed
- Approval (A)

Family Case Plan Information

Plan Type: Family Case Plan Effective Date: 10/22/2016

Plan Name: Updated Sept 9, 2016 Last Case Review Date: 12/01/2016

Plan Developed By: [Redacted]

Review Event: 01/12/2016 - Legal Status

Plan Participant Signature Details Must be Recorded

Child(ren) in the Case Review

Doe, JoJo / 000000000 Female Age 9, DOB 07/01/2007

Protected under ICWA: No Court Case / ID #: 000000

Child Location: Own Home

Agency Legal Status: Open Custody Episode, no Legal Status

Child's Permanency Goal: Reunification

[Redacted]

Protected under ICWA: No Court Case / ID #: 000000

Child Location: Own Home

Agency Legal Status: Open Custody Episode, no Legal Status

Child's Permanency Goal: Reunification

Adult(s) in the Case Review

Doe, Jane / 000000000 Female, Age 36, DOB: MM/DD/YYYY

Doe, John / 000000000 Male, Age 36, DOB: MM/DD/YYYY

Relationships

Family Dynamics

Describe family interactions and new life events since the last assessment.

[Expand Full Screen](#)

[Redacted Text Area]

ABC 1000

Previous Topic **Next Topic** Apply Save Cancel

Completing a Case Review

Adding Household Members

If it is necessary to add a new household member(s):

1. Click, Add New Household Member

New Household Members

Note: Identify additional adults and children who have resided or are residing in the home during the period under review.

Lammon, Pamela / 2926044 - Female

Add New Household Member

Describe how the adults and child(ren) listed above impact family functioning, safety, well-being, and permanency. Describe family interactions. ([expand full screen](#))

Save

The **Add New Household Member to Case Review** screen appears.

1. Place a checkmark in the check box beside the name of the person(s) you wish to add as a new household member.
2. Click, **Save**.

Case / Workload / Case Review / Members to the Review / Add New Household Member to Case Review

Add New Household Member to Case Review

CASE NAME / ID: **Doe, Jane / 000000000 [R]** Ongoing / Open (01/01/2014)

REVIEW TOOL: Case Review REVIEW FOR PLAN: Initial Sept 22, 2016 STATUS: In Progress

New Household Member

Available Persons	
<input type="checkbox"/>	Smith, Jane / 000000 - Associated Person
<input type="checkbox"/>	Smith, Julia / 000000 - Associated Person
<input type="checkbox"/>	Smith, Jennifer / 000000 - Case Member
<input type="checkbox"/>	Smith, Jackie / 000000 - Case Member
<input type="checkbox"/>	Smith, Jamie / 000000 - Associated Person
<input type="checkbox"/>	Smith, Josie / 000000 - Associated Person

Save Cancel

The **Members to the Review** screen appears.

1. Click, **Next Topic**

Completing a Case Review

The screenshot shows a web interface for a case review. At the top, there is a breadcrumb trail: 'Case / Workload / Case Review' followed by a green-bordered box containing 'Members to the Review'. Below this, a grey header bar displays 'CASE NAME / ID: Daft, Sandra / 768944' and 'Ongoing / Open (09/13/2018)'. A second grey bar shows 'REVIEW TOOL: Case Review', 'REVIEW FOR PLAN: Updated Aug 19, 2019', and 'STATUS: In progress'. A green notification bar states 'Your data has been saved.' Below this is a blue bar for 'Case Review Topics' with a left arrow and 'Family Case Plan Information'. Underneath, a blue sidebar lists 'Members to the Review' with a red 'Not Completed' indicator and an 'MR' icon. To the right, it shows 'Plan Type: Family Case Plan' and 'Effective Date: 05/01/2019 - Adult Signature'. At the bottom, a dark grey bar contains buttons for 'Previous Topic', 'Next Topic' (highlighted with a red box), 'Apply', 'Save', and 'Cancel'.

The **Safety Reassessment Topic** appears

Completing the Safety Reassessment Topic

Safety Reassessment Summary

The system will display a **PLACEMENT** badge for all current **Legally Authorized Out of Home Plan Safety Plan(s)**.

The system will display an **OUT OF HOME** badge, with the associated child next to it, for all Voluntary Safety Plan(s) with a Safety Response of “Out-of- Home Safety Plan”.

The system will display an **IN-HOME** badge for all **Voluntary Safety Plans with a Safety Response of In Home Safety Plan**.

When a Legal Custody Episode has been end dated during the current review, it will display in the **Discontinued Legal Authorized Out of Home Plan** drawer.

When PC/PS has been recorded, the system will display a badge of **CUSTODY** and move to the Discontinued Legally Authorized Out of Home Plans drawer.

The system will display the names of the children under, **Child(ren) determined to be safe; no Safety Plan in place**.

- No placement records
- No Safety Plan
- No deceased flag on the person record

In the **Safety Reassessment** grid, there is a list of four (4) Safety Reassessment Tabs that need to be addressed:

- **Safety Factors**
- **Child Vulnerability**
- **Adult Protective Capacity**
- **Safety Response**

Note: Once you have provided information for each Safety Reassessment Topic you have the option to either click, **Next** to go to the next tab, or, you can click any tab; it is not necessary to complete the tabs in order. If you click, Next, or click another tab, your

Completing a Case Review

responses will be saved (for the purpose of this article, the Next feature is used for navigation).

1. Click, **Safety Factors**.

Case / Workload / Case Review / Safety Reassessment

Case Review Topics

- Members to the Review (MIR) Completed
- Safety Reassessment (SR)** Not Completed
- Strengths and Needs Assessment (SN) Not Completed
- Concern Review (CR) Not Completed
- Visitation (V) Not Completed
- Risk Reassessment (RR) Not Completed
- Case Analysis (CA) Not Completed
- Approval (A)

Safety Reassessment Summary

Current Safety Responses for the Review Period

Legally Authorized Out of Home Plan(s)

PLACEMENT Johnny Smith
Certified Foster Home Begin Date: 08/22/2015

Voluntary Safety Plan(s)

OUT OF HOME Johnny Smith, Jimmy Smith, Jane Smith
Effective Date: 08/22/2015 Status: Pending

Voluntary Safety Plan(s)

IN HOME Johnny Smith, Jimmy Smith, Jane Smith
Effective Date: 08/22/2015 Status: Effective-Final

Child(ren) determined to be safe; no Safety Plan in place:
Johnny Smith, Jimmy Smith, Jane Smith

Discontinued Safety Responses for the Review Period

Legally Authorized Plan(s)

Voluntary Safety Plan(s)

Safety Reassessment

- Safety Factors**
- Child Vulnerability
- Adult Protective Capacity
- Safety Response

Safety Response Based On Assessment

IN HOME Smith, Jane - Age 10

OUT OF HOME Smith, Maggie - Age 8

OUT OF HOME Smith, Alexander - Age 5

The **Safety Factors** tab screen appears.

Completing the Safety Factors Tab

1. Select **Yes** or **No** for each Safety Factor.
2. Place a checkmark(s) in the relevant check box(es) beside the items under, **Examples to Support Yes Response for Safety Factor**.

Completing a Case Review

Note: For all Safety Factors with a **Yes** selected, a **Rationale** for each of these questions is required. A No response, worker has option to record a response

Important: Once you have provided information under a tab, you have the option to either click, **Next** to go to the next tab, or, you can click any tab; it is not necessary to complete the tabs in order. If you click, Next, or click another tab, your responses will be saved (for the purposes of this article, the Next feature is used for instruction).

The system will display a status of **Completed** for the Safety Factors link when the **Not Answered** radio button (selected by default) is no longer selected for all Safety Factor questions.

- When you are finished with the Safety Factors tab page, click, **Next** (or the **Child Vulnerability** tab).

The screenshot shows a web application interface for a case review. At the top, there is a breadcrumb trail: "Case / Workload / Case Review / Safety Reassessment". Below this is a "Safety Factors" tab, which is highlighted with a green box. The interface displays case information: "CASE NAME / ID: Ongoing / Open (03/09/2018)", "REVIEW TOOL: Case Review", "REVIEW FOR PLAN: Updated Aug 12, 2019", and "STATUS: In progress". A green notification bar states "Your data has been saved." Below this is a navigation bar with tabs: "Safety Factors" (highlighted with a green box), "Child Vulnerability", "Adult Protective Capacity", and "Safety Response". The main content area is titled "Safety Factors" and contains two questions. Question 1 is "1. Child has inflicted physical injuries." and Question 2 is "2. Caretaker has not, cannot, or will not protect the child from potential serious harm, including harm from other persons having familial access to the child." Both questions have a "Field Guide" link. Below each question is a list of "Examples to Support Yes Response for Safety Factor" with checkboxes. At the bottom of each question is a radio button selection: "Not Answered" (selected), "Yes", and "No". At the bottom of the page is a navigation bar with buttons: "Previous", "Next" (highlighted with a red box), "Apply", "Save", and "Cancel".

The **Child Vulnerability** tab page appears.

Completing the Child Vulnerability Tab

Note:

- All radio buttons are defaulted to: **Not Answered**.

Completing a Case Review

- All Child Vulnerabilities require a **Yes** or **No** response and a Description, regardless of the response.
- When there is a **Yes** response to any of the vulnerabilities, you can check box(es) beside any applicable examples in the Field Guide to assist in the identification of a vulnerability. **It is NOT required to select any field guide check box(es).**

1. Select **Yes** or **No** for each potential vulnerability.

Note: The screen will expand.

2. Enter narrative in response to: **Provide a description of the vulnerability.**

3. Click, **Next**.

Case / Workflow / Case Review / Safety Assessment
Child Vulnerability

CASE NAME / ID: [redacted] Ongoing / Open (03/09/2018)

REVIEW TOOL: Case Review REVIEW FOR PLAN: Updated Aug 12, 2019 STATUS: In progress

Your data has been saved.

Safety Factors > **Child Vulnerability** > Adult Protective Capacity > Safety Response

Child Vulnerability

Thompson, Wyatt - Male Age 9 Not Completed

Child Vulnerability ^

1. Child has a physical vulnerability:
Field Guide ^

Examples to assist in the identification of a vulnerability

<input type="checkbox"/> The child has a physical disability/diagnosis that requires special care and attention (physical therapy, diabetic, developmentally disabled, hearing impaired).	<input type="checkbox"/> The child is not visible to others outside of the family system.
<input type="checkbox"/> The child's physical appearance does not fit cultural norms (stuffed, obese).	<input type="checkbox"/> The child is young (birth to five years of age).
<input type="checkbox"/> The child is small in height or weight.	<input type="checkbox"/> The child cannot verbalize that maltreatment is occurring.
<input type="checkbox"/> The child is immobile.	<input type="checkbox"/> The child's appearance provokes parental hostility (resembles an individual the caretaker does not like).
<input type="checkbox"/> The child is in a stage of development that creates parental frustration (e.g., the child is not potty trained, has temper tantrums, bites).	<input type="checkbox"/> The child is physically unable to remove him/herself from a situation.
<input type="checkbox"/> The child's soft spot (on the head) has not yet closed.	

Not Answered Yes No

Provide a description of the vulnerability: [expand full screen](#)

2. Child has an emotional (personality) vulnerability:
Field Guide ^

Examples to assist in the identification of a vulnerability

<input type="checkbox"/> The child requires intensive physical care (medically fragile, hearing impaired, blind).	<input type="checkbox"/> The child overreacts to audible noises.
<input type="checkbox"/> The child does not demonstrate an attachment to his or her caretaker.	<input type="checkbox"/> Disobedience - the child cannot tolerate external events or stimulation interferes with or deters the child from an ongoing activity.
<input type="checkbox"/> Adaptability - the child cannot adapt to intrusions, transitions, and changes without distress.	<input type="checkbox"/> The child cannot tolerate frustration - (how easily the child can withstand the disorganizing effects of limits, obstacles, and rules).
<input type="checkbox"/> The child is passive and easily influenced.	<input type="checkbox"/> The child requires intense emotional support from his or her caretaker.
<input type="checkbox"/> The child is overly sensitive to physical touch.	<input type="checkbox"/> The child lacks the ability to deescalate him/herself.

Not Answered Yes No

Previous **Next** Apply Save Cancel

Note: For children who have a deceased date entered on the person record within this Review period, the system will display a **DECEASED** badge next to the child's name. The system will not display the Child Vulnerability drawer, but rather: **Describe the cause and circumstances regarding the fatality or near fatality, as well as the situation of any siblings (or other children in the home) from the Approved Child Fatality/Near Fatality report.** You will need to provide narrative.

- If there is no Approved Child Fatality work-item, the system will display: **Child Fatality/Near Fatality record must be completed and approved.**

Completing a Case Review

Case / Workload / Case Review / Safety Reassessment / Child Vulnerability

CASE NAME / ID: **Doe, Jane / 000000000 [R]** Ongoing / Open (01/01/2014)

REVIEW TOOL: Case Review REVIEW FOR PLAN: Initial Sept 22, 2016 STATUS: In Progress

Safety Factors **Child Vulnerability** Adult Protective Capacity Safety Response

Child Vulnerability

Smith, Jimmy - Male - Age 1 ❗ Not Completed
[Child Vulnerability](#) ▾

Smith, Jane - Female - Age 14 DECEASED Completed

Describe the cause and circumstances regarding the fatality or near fatality, as well as the situation of any siblings (or other children in the home)?

1000 Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, aliquet nec, vulputate eget, arcu. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus. Vivamus elementum semper nisi. Aenean vulputate eleifend tellus. Aenean leo ligula, porttitor eu, consequat vitae, eleifend ac, enim. Aliquam lorem ante, dapibus in, viverra quis, feugiat a, tellus. Phasellus viverra nulla ut metus varius laoreet. Quisque rutrum. Aenean imperdiet. Etiam ultricies nisi vel augue. Curabitur ullamcorper ultricies nisi. Nam eget dui. Etiam rhoncus. Maecenas tempus, tellus eget condimentum rhoncus, sem quam semper libero, sit amet adipiscing sem neque sed ipsum. N

Smith, Morgan - Female - Age 17 DECEASED ❗ Not Completed

Child Fatality/Near Fatality record must be completed and approved.

Previous Next Apply Save Cancel

The **Adult Protective Capacity** tab screen appears.

Completing the Adult Protective Capacity Tab

- All radio buttons are defaulted to: **Not Answered**.
 - All Adult Protective Capacity vulnerabilities require a **Yes** or **No** response and a Description, regardless of the response.
 - When there is a **Yes** response to any of the Adult Protective Capacities, you can check box(es) beside any applicable examples in the Field Guide to assist in the identification of a vulnerability. **It is NOT required to select any field guide check box(es).**
1. Select Yes or No for each adult.
 2. Enter a description for each adult.
 3. When you are finished, click, **Next**.

The system will display a Status of Completed for the Adult Protective Capacity topic when each adult has a Status of Completed.

Completing a Case Review

Case / Workload / Case Review / Safety Reassessment **Adult Protective Capacity**

CASE NAME / ID: Doe, Jane / 000000000 [R] Ongoing / Open (01/01/2014)

REVIEW TOOL: Case Review REVIEW FOR PLAN: Initial Sept 22, 2016 STATUS: In Progress

Safety Factors > Child Vulnerability > **Adult Protective Capacity** > Safety Response

Adult Protective Capacity

Smith, John - Male - Age 30 ! Not Completed
[Adult Protective Capacity](#) ^

1. Adult exhibits protective capacities in the behavioral domain [Expand all Field Guides](#)
[Field Guide](#) v

Not Answered Yes No

Provide a description of the behavioral protective capacity:
[Expand Full Screen](#)

2. Adult exhibits protective capacities in the cognitive domain
[Field Guide](#) v

Not Answered Yes No

Provide a description of the lack of cognitive protective capacities:
[Expand Full Screen](#)

3. Adult exhibits protective capacities in the emotive domain:
[Field Guide](#) v

Not Answered Yes No

The **Safety Response** tab page appears.

Completing the Safety Response Tab

1. Make a selection from the drop-down menu in the **Recommended Safety Response** grid.

Important: If you make a selection that does not match the current safety response, a warning sign will be displayed. The warning will vary, based on your selection:

1. When the answer for Recommended Safety Response for any child is **In Home Safety Plan, Out-of-Home Safety Plan and Legal Authorized Out-**

Completing a Case Review

of-Home, and does not match the child's current safety response, the system will display a Warning Message: **This selection is not consistent with the information on Safety Reassessment Summary. Please update the Safety Plan or Placement, if this is the intended selection.**

2. When the answer for Recommended Safety Response for any child is **Child Deceased**, and there is no deceased date entered on the person record, the system will display the following warning message: **The Person record information does not indicate this person is deceased.**

 This selection is not consistent with the information on Safety Reassessment Summary. Please update your Safety Plan or Placement if this is the intended selection

 The Person record information does not indicate this person is deceased

3. Upon approval of the Case Review, when the safety response for one or more child participants is Out of Home or In Home Safety Plan, the following information will display on the In Progress Safety Plan:
 - The Safety Plan Created as a Result of field on the Participants tab will populate **Case Review**.
 - Child Plan Participant in the Case Review for whom the Safety Response is Out of Home or In Home Safety Plan will be the **child participant** on the Safety Plan.
 - All Adult Plan Participants in the review will Adult Participants on the Safety Plan.
 - The Safety Plan Safety Response will be Out-of-Home Safety Plan or In Home Safety Plan.
4. Enter narrative in the text box for the following: **Rationale to Support the Safety Response Identified for the Child(ren).**
5. Click, **Save**.

Completing a Case Review

Safety Factors > Child Vulnerability > Adult Protective Capacity > **Safety Response**

Recommended Safety Response

Recommended Safety Response for Each Child:

Smith, Jane - Age 10

Smith, Maggie - Age 8

Smith, Alexander - Age 5

Rationale to Support the Safety Response Identified for the Child(ren):
Provide a rationale for each safety response selected.
[Expand Full Screen](#)

ABC 1000

Previous Next Apply **Save** Cancel

The **Safety Reassessment** page appears, displaying the Safety Response Based on Assessment. The Safety Reassessment Case Review Topic displays as, **Completed**. Click, **Next Topic**.

Case / Workload / Case Review / Safety Reassessment

CASE NAME / ID: Ongoing / Open (09/13/2018)

REVIEW TOOL: Case Review REVIEW FOR PLAN: Updated Aug 19, 2019 STATUS: In progress

Your data has been saved.

Case Review Topics

- Members to the Review (MR) Completed
- Safety Reassessment (SR) Completed**
- Strengths and Needs Assessment (SN) Not Completed
- Concern Review (CR) Not Completed
- Visitation (V) Not Completed
- Risk Reassessment (RR) Not Completed
- Case Analysis (CA) Not Completed

Safety Reassessment Summary

- Safety Reassessment
 - Safety Factors
 - Child Vulnerability
 - Adult Protective Capacity
 - Safety Response

Safety Response Based On Assessment

SAFE

SAFE

Previous Topic Next Topic Close

The **Strengths and Needs Topic** page appears.

Completing the Strengths and Needs Topic

Note: Tab pages can be completed in any order. As you navigate among the tabs, your information will be automatically saved.

Completing a Case Review

Note: All **Field Guides** will be open by default. If you wish to close them all, click the **Collapse All Field Guides** options in the right corner of the page.

Completing the Child Functioning Tab

1. Click, **Child Functioning**.

The screenshot shows a web interface for a case review. At the top, there is a breadcrumb trail: 'Case / Workload / Case Review / Strengths and Needs Assessment'. Below this, a header bar displays 'CASE NAME / ID:' followed by a blue box and 'Ongoing / Open (12/30/2018)'. A secondary bar shows 'REVIEW TOOL: Case Review', 'REVIEW FOR PLAN: Initial May 22, 2019', and 'STATUS: In progress'. The main content area is titled 'Case Review Topics' and features a list of review items on the left and a detailed view on the right. The 'Child Functioning' item is highlighted with a red box. The list on the left includes: 'Members to the Review' (MR, Not Completed), 'Safety Reassessment' (SR, Not Completed), 'Strengths and Needs Assessment' (SN, Not Completed), and 'Concern Review' (CR, Not Completed). The detailed view on the right shows 'Child Functioning' (Not Completed) with a red circle icon and a dropdown arrow for 'Assessment Responses'. Below it are 'Adult Functioning', 'Family Functioning', and 'Historical Functioning', each also marked as 'Not Completed' with a red circle icon and a dropdown arrow for 'Assessment Responses'.

Note: If the FCP has a Risk Contributor associated to an Active Concern, it will display beside the person's name (see graphic below). The Concern hyperlink will take you to the Active Concern.

1. Enter narrative in response to: **Provide a description of this element for this child.**

There are three (3) Risk Contributors listed within the Child Functioning tab:

- Self Protection
- Physical/Cognitive/Social Development
- Emotional/Behavioral Functioning

Follow the instructions below to complete the information regarding each Risk Contributor within the Child Functioning tab page:

2. Place a checkmark(s) in the check box(es) beside any applicable risk factor(s) listed as, **Examples of Risk Contributors for this element** list. **THIS IS NOT REQUIRED.**
3. Select **Risk Contributor** or **Non-Risk Contributor** based on the caseworker's assessment of this contributor.
4. Enter narrative in the text box (for each Risk Contributor) in response to: **Provide a description of this element for this child.**

Note: You can collapse the Examples of Risk Contributors list by clicking on the Collapse all Field Guides drawer.

Completing a Case Review

Child Functioning Adult Functioning Family Functioning Historical Functioning

Emotional/Behavioral Functioning

Field Guide [^](#) [Collapse all Field Guides](#)

Examples of Risk Contributors for this element (check all that apply):

<input type="checkbox"/> Is argumentative with caregiver.	<input type="checkbox"/> Unable to soothe self.
<input type="checkbox"/> Seeks negative attention by agitating others.	<input type="checkbox"/> Runs away from home.
<input type="checkbox"/> Overreacts to audible noises.	<input type="checkbox"/> Uses or has an addiction to alcohol and/or drugs.
<input type="checkbox"/> Is overly sensitive to physical touch.	<input type="checkbox"/> Resistant to toilet training.
<input type="checkbox"/> Lacks the ability to deescalate self.	<input type="checkbox"/> Is defiant to caregiver/authority.
<input type="checkbox"/> Demonstrates sexually provocative behaviors.	<input type="checkbox"/> Requires intense emotional support from his or her caretaker.
<input type="checkbox"/> Involved with juvenile court.	<input type="checkbox"/> Does not demonstrate an attachment to his or her caretaker.
<input type="checkbox"/> Exhibits anti-social behavior.	<input type="checkbox"/> Unable to tolerate frustration
<input type="checkbox"/> Engages in committing crimes.	<input type="checkbox"/> Behavior escalates in response to limit-setting or punishment by caretaker.
<input type="checkbox"/> Is oppositional to authority (parent, teachers, neighbors, other adults).	<input type="checkbox"/> Does not demonstrate an attachment to his or her caretaker.
<input type="checkbox"/> Continues to incite adult even after hostile exchange begins.	<input type="checkbox"/> Is sexually and/or physically aggressive toward other children.
<input type="checkbox"/> Has an eating disorder.	<input type="checkbox"/> Is defiant to caregiver/authority.
<input type="checkbox"/> Cries excessively.	<input type="checkbox"/> Other, not listed
<input type="checkbox"/> Has a high energy level; in constant motion.	

Smith, Johnny - Age 10 - Identified as a Risk Contributor within [Concern\(s\)](#)

Not Answered Risk Contributor Non-Risk Contributor

Provide a description of this element for this child:

ABC 1000

5. Once you have completed the Child Functioning tab page, click, **Next**. The **Adult Functioning** Tab page appears.

Completing the Adult Functioning Tab

Follow the instructions below to complete the information regarding each Risk Contributor within the Adult Functioning tab page:

1. Place a checkmark(s) in the check box(es) beside any applicable risk factor(s) listed as, **Examples of Risk Contributors for this element** list. THIS IS NOT REQUIRED.

There are seven (7) Risk Contributors listed within the Adult Functioning tab:

- Cognitive Abilities
- Physical Health
- Emotional / Mental Health Functioning
- Domestic Relations (Domestic Violence)
- Substance Use

Completing a Case Review

- Response to Stressors
 - Parenting Practices
2. Select **Risk Contributor** or **Non-Risk Contributor** based on the caseworker's assessment of this contributor
 3. Enter narrative in the text box (for each Risk Contributor) in response to: **Provide a description of this element for this adult.**
 4. Once you have completed the Adult Functioning tab page, click, **Next**.

Child Functioning | **Adult Functioning** | Family Functioning | Historical Functioning

Cognitive Abilities

Field Guide ^ [Collapse All Field Guides](#)

Examples of Risk Contributors for this element (check all that apply):

<input type="checkbox"/> Is not reality oriented.	<input type="checkbox"/> Does not understand the common stressors of parenting; has unrealistic expectations of the child.
<input type="checkbox"/> Does not have accurate knowledge of age-appropriate supervision for the child.	<input type="checkbox"/> Does not understand the basic needs of the child.
<input type="checkbox"/> Cognitive impairment inhibiting adult from responding to an emergency situation.	<input type="checkbox"/> Caretaker does not recognize/understand need to protect child.
<input type="checkbox"/> Organic or inorganic cognitive impairment.	<input type="checkbox"/> Cognitive delay impacts understanding of sanitary home/disposal of waste.
<input type="checkbox"/> Does not understand the child's development in relation to the child's age.	<input type="checkbox"/> Lacks understanding and reasoning skills.
<input type="checkbox"/> Unable to recognize the child's basic needs due to cognitive impairment.	<input type="checkbox"/> Does not understand supervision of a child.
<input type="checkbox"/> Cognitive impairment allows child to be exploited.	<input type="checkbox"/> Cognitive delay subjects child to unsafe situations.
<input type="checkbox"/> Does not understand the child's ability/inability to complete chores.	<input type="checkbox"/> Does not understand the child's physical abilities in relation to age.

Not Answered Risk Contributor Non-Risk Contributor

Provide a description of this element for this child: [\(expand full screen\)](#)

Not Answered Risk Contributor Non-Risk Contributor

Provide a description of this element for this child: [\(expand full screen\)](#)

[Previous](#) [Next](#) [Apply](#) [Save](#) [Cancel](#)

The **Family Functioning Tab** page appears.

Completing the Family Functioning Tab

Follow the instructions below to complete the information regarding each Risk Contributor within the Family Functioning tab page:

There are three (3) Risk Contributors on the page:

- Family Roles, Interactions, and Relationships
- Resource Management
- Extended Family, Social and Community Connectedness

1. Place a checkmark(s) in the check box(es) beside any applicable risk factor(s) listed as, **Examples of Risk Contributors for this element** list. **THIS IS NOT REQUIRED.**

Completing a Case Review

2. Select **Risk Contributor** or **Non-Risk Contributor** based on the caseworker's assessment of this contributor
3. Enter narrative in the text box (for each Risk Contributor) in response to: **Provide a description of this element for this family.**
4. Once you have completed the Family Functioning tab page, click, **Next**.

Child Functioning Adult Functioning Family Functioning **Historical Functioning**

Family Roles, Interactions, and Relationships

Field Guide [^](#) [Collapse all Field Guides](#)

Examples of Risk Contributors for this element (check all that apply):

- Is argumentative with caregiver.
- Seeks negative attention by agitating others.
- Overreacts to audible noises.
- Is overly sensitive to physical touch.
- Lacks the ability to deescalate self.
- Demonstrates sexually provocative behaviors.
- Involved with juvenile court.
- Exhibits anti-social behavior.
- Engages in committing crimes.
- Is oppositional to authority (parent, teachers, neighbors, other adults).
- Continues to incite adult even after hostile exchange begins.
- Has an eating disorder.
- Cries excessively.
- Has a high energy level, in constant motion.
- Unable to soothe self.
- Runs away from home.
- Uses or has an addiction to alcohol and/or drugs.
- Resistant to toilet training.
- Is defiant to caregiver/authority.
- Requires intense emotional support from his or her caretaker.
- Does not demonstrate an attachment to his or her caretaker.
- Unable to tolerate frustration
- Behavior escalates in response to limit-setting or punishment by caretaker.
- Does not demonstrate an attachment to his or her caretaker.
- Is sexually and/or physically aggressive toward other children.
- Is defiant to caregiver/authority.
- Other, not listed

Identified as a Risk Contributor within [Concern\(s\)](#)

Not Answered Risk Contributor Non-Risk Contributor

Provide a description of this element for this family:

✓ ABC
1000

Previous **Next** Apply Save Cancel

The **Historical Functioning** tab page appears.

Completing the Historical Functioning Tab

Follow the instructions below to complete the information regarding each Risk Contributor within the Historical Functioning tab page:

There are three (3) Risk Contributors on the page:

- Caretaker's Victimization of Other Children
- Caretaker's Abuse/Neglect as a Child
- Impact of Past Services

1. If applicable, place a checkmark(s) in the check box(es) beside any applicable risk factor(s) listed as, **Examples of Risk Contributors for this element** list. **THIS IS NOT REQUIRED.**

Completing a Case Review

2. Select **Risk Contributor** or **Non-Risk Contributor** based on the caseworker's assessment of this contributor.
3. Enter narrative in the text box (for each Risk Contributor) in response to: **Provide a description of this element for this family.**
4. Once you have completed the Family Functioning tab page, click, **Save**.

Caretaker's Victimization of Other Children

[Field Guide](#) [Collapse all Field Guides](#)

Examples of Risk Contributors for this element (check all that apply):

- Is argumentative with caregiver.
- Seeks negative attention by agitating others.
- Overreacts to audible noises.
- Is overly sensitive to physical touch.
- Lacks the ability to deescalate self.
- Demonstrates sexually provocative behaviors.
- Involved with juvenile court.
- Exhibits anti-social behavior.
- Engages in committing crimes.
- Is oppositional to authority (parent, teachers, neighbors, other adults).
- Continues to incite adult even after hostile exchange begins.
- Has an eating disorder.
- Cries excessively.
- Has a high energy level, in constant motion.
- Unable to soothe self.
- Runs away from home.
- Uses or has an addiction to alcohol and/or drugs.
- Resistant to toilet training.
- Is defiant to caregiver/authority.
- Requires intense emotional support from his or her caretaker.
- Does not demonstrate an attachment to his or her caretaker.
- Unable to tolerate frustration.
- Behavior escalates in response to limit-setting or punishment by caretaker.
- Does not demonstrate an attachment to his or her caretaker.
- Is sexually and/or physically aggressive toward other children.
- Is defiant to caregiver/authority.
- Other, not listed.

Smith, Johnny - Age 30 - Identified as a Risk Contributor within [Concern\(s\)](#)

Not Answered Risk Contributor Non-Risk Contributor

Provide a description of this element for this adult:

Smith, Jane - Age 30 - Identified as a Risk Contributor within [Concern\(s\)](#)

Not Answered Risk Contributor Non-Risk Contributor

Provide a description of this element for this adult:

[Previous](#) [Next](#) [Apply](#) [Save](#) [Cancel](#)

Note: The system will display a Status of Completed for the Child Functioning, Adult Functioning, Family Functioning and Historical Functioning link when the following is completed:

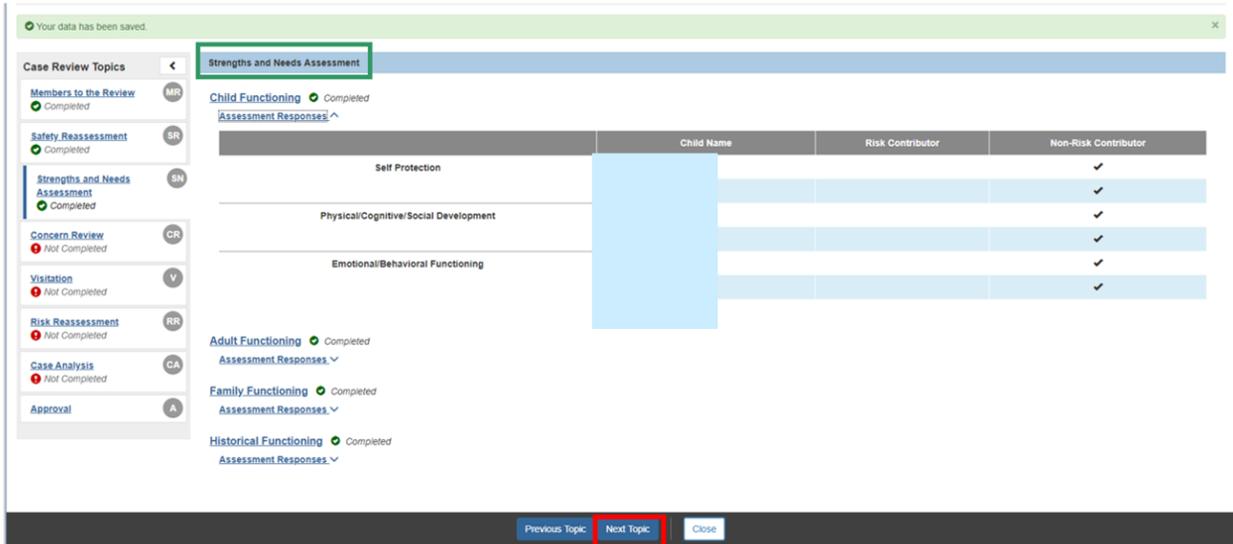
- The **Not Answered** radio button is no longer selected for all Child Functioning questions.
- When each request to: **Provide a description of this element for this child** is complete.

The **Strengths and Needs Assessment** screen appears.

The **Assessment Responses** drawers will display the Risk Contributors and Non-Risk Contributors that were selected during this review for each person.

5. Click **Next Topic**.

Completing a Case Review



The **Concern Review** topic page appears.

Completing the Concern Review Topic

The **Concern Review** topic screen appears, displaying the **Active Concerns** grid and **Concerns Completed during this Review Period**.

Note: **Risk Contributors** and **Non-Risk Contributors** associated to this concern can be viewed by expanding the drawers.

1. Click, **edit progress**.

Note: The **red** exclamation point indicates this concern is not complete. A **green** check mark, when present, indicates the concern review is complete.

Completing a Case Review

1. Enter narrative in the **Progress** grid in response to the following statement: **Discuss the impact toward addressing safety, risk, permanency and/or child well-being issues in detail. If applicable, include any existing barriers to services.**
2. Make a selection from the **Progress toward Addressing Concern** drop-down menu beside the name of each person associated to this concern.
3. Make a selection from the **Proposed Action for this Concern** drop-down menu

Progress

Discuss the impact toward addressing safety, risk, permanency and/or child well-being issues in detail. If applicable, include any existing barriers to services.
[Expand Full Screen](#)

✓ ABC
4000

Smith, Jimmy / 0000000 Male Age 1	Progress toward Addressing Concern:	<input type="text"/>
Smith, Janey / 0000000 Female Age 12	Progress toward Addressing Concern:	<input type="text"/>
Smith, John / 0000000 Male Age 26	Progress toward Addressing Concern:	<input type="text"/>
Smith, Jane / 0000000 Female Age 26	Progress toward Addressing Concern:	<input type="text"/>

Proposed Action for this Concern:

Important: When there is a response of Terminate or Modified in the Proposed Action for this Concern, the system will default the, "Will this Family Case Plan be updated as a result of this review?" to, **Yes** in the Case Analysis Topic with Selected Update Reasons of Modify Strength and Concern. This will be editable to the user.

Note: The system will populate all Selected Update Reasons from the Case Review in the Update Information screen of the Family Case Plan upon approval of the Case Review.

4. Click **Next**.

Completing a Case Review

The **Visitation** screen appears, defaulted to the **Adult Visitation** tab.

Completing the Visitation Topic

Completing the Adult Visitation Tab

Note: Child(ren) with no Adult Visitors will display when there are no Adult Visitation Plans or No Adult Visitors on the selected Family Case Plan. The Justification narrative on the Family Case Plan will display for the associated child.

Adult Visitation Sibling Visitation Caseworker Visits

Child(ren) with No Adult Visitors

If the following child(ren) have adult visitors OR their justification needs modified, please update the Family Case Plan.

Charlesworth-Dewitt, Jason Circularsaw - Male Age 3

Justification for not having adult visitors:
This is where there would be a justification text that is read only presented here for all to read. The justification could range up to 1000 characters. This is where there would be a justification text that is read only presented here for all to read. The justification could range up to 1000 characters. This is where there would be a justification text that is read only presented here for all to read. The justification could range up to 1000 characters.

1. Click the **Actions** drawer.

Adult Visitation Summary

Dewitt, John Wayne Dubois [H] **Actions ...**

Visiting 2 times monthly in Agency Setting for 2 hours **RESTRICTED** **SUPERVISED**

Charlesworth-Dewitt, Jack Sawsall - Male Age 9
[Visitation Information](#) ▾

Visiting 3 times monthly in Neutral Setting for 1 hour

Charlesworth-Dewitt, Janey Hacksaw - Female Age 12
[Visitation Information](#) ▾

Visiting 4 times monthly in Agency Setting for 2 hours **SUPERVISED**

Charlesworth-Dewitt, Jimmy Chainsaw - Male Age 10
Charlesworth-Dewitt, Jessa Bandsaw - Female Age 8
[Visitation Information](#) ▾

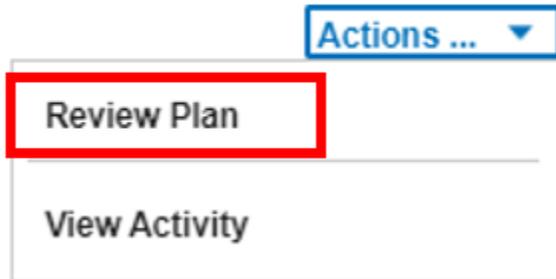
The drawer will expand.

1. Select, **Review Plan**.

Completing a Case Review

2. **Note: View Activity** will navigate to the Activity Logs that are linked to this visitation plan.

Note: The **Visitation Information** drawer has full details of the Adult Visitation Plan.



The **Visitation Review** grid appears.

- If **Yes** is the response to, **Have visits occurred between the above adult and child(ren)**, the system will display, **Describe the quality, duration, and frequency of these visits.**
- If **No** is the response to, **Have visits occurred between the above adult and child(ren)**, the system will display, **Please provide a rationale on why no visits have occurred.**
- If **Some children, but not all** is the response to, **Have visits occurred between the above adult and child(ren)**, the system will display, **Describe the quality, duration, and frequency of these visits** and **Please provide a rationale on why no visits have occurred.**
- If **Yes** is the response to, **As a result of this Review, does the Visitation Plan need to be modified?** the system will default the **Will this Family Case Plan be updated as a result of this review?** on the Case Analysis screen to **Yes** with a Selected Update Reasons of Visitation Plan. This will be editable to the user.

Completing a Case Review

Visitation Review

Dewitt, Betty Machete [H]

Visiting 1 times weekly in Neutral Setting for 4 hours

Charlesworth-Dewitt, Janey Hacksaw - Female Age 12
Charlesworth-Dewitt, Jimmy Chainsaw - Male Age 10
Charlesworth-Dewitt, Jack Sawsall - Male Age 9
Charlesworth-Dewitt, Jessa Bandsaw - Female Age 8

Have visits occurred between the above adult and child(ren)?

Not Answered Yes No Visiting some children, but not all

Describe the quality, duration, and frequency of these visits: [\(expand full screen\)](#)

Please provide a rationale on why no visits have occurred: [\(expand full screen\)](#)

As a result of this Review, does the Visitation Plan need to be modified?

Not Answered Yes No

Apply to Other Adults

 Selecting an option below will override any existing responses.

	Adult Name
<input type="checkbox"/>	Smith, Jarob - Male, Age 30
<input type="checkbox"/>	Smith, John - Male, Age 40

Important: Choosing another adult will apply this response to the corresponding Adult's visitation review. The above Warning Message will display, if the Apply to Other Adults section displays.

Completing a Case Review

Completing the Sibling Visitation Tab

1. Click the **Sibling Visitation** tab, if Applicable.



The **Visitation** screen appears, displaying the **Sibling Visitation** tab page.

This page displays the **Siblings Not Visiting Each Other** and **Siblings Who May Visit Each Other**.

1. Click the **Details** drawer in the **Siblings Who May Visit Each Other** grid for more detailed information on the children who are visiting each other.

Note: This tab will only appear if there is a sibling visitation plan from the FCP that is being reviewed.

2. Click the **Actions** drawer.
3. Click, **Review Plan** in the Actions drop-down menu.

Completing a Case Review

Case / Workload / Case Review / Visitation

CASE NAME / ID: Doe, Jane / 000000000 [R] Ongoing / Open (01/01/2014)

REVIEW TOOL: Case Review REVIEW FOR PLAN: Initial Sept 22, 2016 STATUS: In Progress

Case Review Topics

- Members to the Review (MR) Completed
- Safety Reassessment (SR) Not Completed
- Strengths and Needs Assessment (SN) Not Completed
- Concern Review (CR) Not Completed
- Visitation (V) Not Completed
- Risk Reassessment (RR) Not Completed
- Case Analysis (CA) Not Completed
- Approval (A)

Adult Visitation | **Sibling Visitation** | Caseworker Visits

Siblings Not Visiting Each Other

Jimmy is not visiting Jessa or Jack

Describe the reason the siblings are not visiting:
There would be a number of reasons these sibs can't visit right now. If this comments box had way more characters we could minimize it by showing only the first xxx characters and then presenting a link than can be clicked on to... [Show More](#)

Siblings Who May Visit Each Other

Jimmy, Janey, Katlynn and Jack are visiting each other

[Details](#)

Siblings in agency custody who are visiting each other:

- Charlesworth-Dewitt, Janey Hacksaw - Female Age 12
- Charlesworth-Dewitt, Jimmy Chainsaw - Male Age 10
- Charlesworth-Dewitt, Jack Sawsall - Male Age 9

Other siblings/child(ren) who are visiting:

- Dewitt, Katlynn Copingsaw - Female Age 13

Description of sibling visitation:
This is the description of the sibling visitation. If this comments box had way more characters we could minimize it by showing only the first xxx characters and then presenting a link than can be clicked on to show the full 4000 chars... [Show More](#)

Jack and Jessa are visiting each other

[View Activity](#)

Note: Click, View Activity.

The **Visitation Review** page appears.

If **Have visits occurred between the above siblings** is answered **Yes**, provide narrative in response to, **Describe the quality, duration, and frequency of these visits.**

If **Have visits occurred between the above siblings** is answered **No**, provide narrative in response to, **Please provide a rationale on why no visits have occurred.**

If **Have visits occurred between the above siblings** is answered **Some siblings, but not all**, provide narrative in response to, **Describe the quality, duration, and frequency of these visits** and **Please provide a rationale on why no visits have occurred.**

Select the appropriate radio button in response to, **As a result of this Review, does the Visitation Plan need to be modified?** If **Yes** is selected as the response to the modification question, the system will default the **Will this Family Case Plan be updated as a result of this review?** on the Case Analysis screen to **Yes** with a Selected Update Reasons of Visitation Plan. This will be editable to the user.

Completing a Case Review

Visitation Review

Jimmy, Janey, Katlynn and Jack are visiting each other

Have visits occurred between the above siblings?

Not Answered Yes No Some siblings visiting, but not all

Describe the quality, duration, and frequency of these visits: [\(expand full screen\)](#)

Please provide a rationale on why no visits have occurred: [\(expand full screen\)](#)

As a result of this Review, does the Visitation Plan need to be modified?

Not Answered Yes No

Completing the Caseworker Visits tab

On clicking the **View Face to Face Visits** hyperlink, the system will navigate to the Activity Log list screen with the following default filter options selected:

- Activity From Date will default to the last Case Review Approved Date for this plan episode
- Activity To Date will default to today's date
- Contact Type will default to Face-to-Face
- Activity State will default to Completed
- Agency will default to the Agency of the logged in user
- Contact Status will default to Completed

Note: View Face to Face Visits hyperlink will not display on Approved Case Reviews.

Completing a Case Review

Adult Visitation Sibling Visitation Caseworker Visits

Caseworker Visitation Summary

[View Face to Face Visits](#)

Describe the frequency and quality of caseworker visits with child(ren), which have occurred since the last assessment or review.
[Expand Full Screen](#)

Describe the frequency and quality of caseworker visits with the parent, caretaker, and other adults which have occurred since the last assessment or review.
[Expand Full Screen](#)

Click **Next** and the Risk Reassessment page appears.

Completing the Risk Reassessment Topic

1. In the **Risk Reassessment** grid, use the radio buttons (or check boxes, when necessary) to respond to the information being requested.

Important: Each Field Guide drawer expands to provide detailed instruction/explanation for answering the questions.

2. If Applicable, enter narrative in response to: **Describe reasons for any policy/discretionary override(s).**
3. Click, **Calculate Scores.**

Completing a Case Review

If necessary, make a selection from the **Available Update Reasons** grid (the **Add** feature will be activated).

5. Click, **Add**, to place the selection in the **Selected Update Reasons** grid.

The screenshot displays the Case Review interface for the 'Case Analysis' topic. The interface includes a sidebar with various review topics, a main content area for 'Case Analysis', and a bottom navigation bar. The 'Case Analysis' section contains several fields and a text area, all highlighted with red boxes. The 'Available Update Reasons' grid is shown below the main content area, with the 'Add' button highlighted in green. The 'Selected Update Reasons' grid is empty.

Case / Workload / Case Review Case Analysis

CASE NAME / ID: Ongoing / Open (12/30/2018)

REVIEW TOOL: Case Review REVIEW FOR PLAN: Initial: May 22, 2019 STATUS: In progress

Case Review Topics

- Members to the Review (MR) Not Completed
- Safety Reassessment (SR) Not Completed
- Strengths and Needs Assessment (SN) Not Completed
- Concern Review (CR) Completed
- Visitation (V) Not Completed
- Risk Reassessment (RR) Not Completed
- Case Analysis (CA) Not Completed
- Approval (A)

Case Analysis

Agency Involvement:

Continue Agency Involvement - Family in need of Agency Services

All child(ren) have moved or are moving to an Adoption case

In-Home Supportive Services

Protective Supervision

Out-of-Home Placement

Upcoming Court Hearings

Describe the reasons for the case status selected above. Discuss how the risk reassessment, safety review, family perception, case progress review, including strengths and needs summary and services review informs change readiness of the family, permanency planning and service provision. If case is being closed, provide a summary justifying case closure.* (expand full screen)

Will the Family Case Plan be updated as a result of this review?

Available Update Reasons

Add

- Addition of Case Plan Participant
- Case Closure
- Child Death
- Compelling Reasons
- Extension of Time Lines
- Modify Concerns
- Legal Status Change

Selected Update Reasons

Remove

Previous Topic Next Topic Apply Save Cancel

If you select, **Terminate Agency Services** from the Agency Involvement drop-down menu, the screen will expand to request further information.

1. Select from the **Reason for Termination** drop-down menu.
2. Place a checkmark(s) beside the applicable reason(s) for terminating agency services.

Completing a Case Review

Case / Workload / Case Review / Case Analysis

CASE NAME / ID: [redacted] Ongoing / Open (12/30/2018)

REVIEW TOOL: Case Review REVIEW FOR PLAN: Initial May 22, 2019 STATUS: In progress

Case Review Topics

- Members to the Review (MR) Not Completed
- Safety Reassessment (SR) Not Completed
- Strengths and Needs Assessment (SN) Not Completed
- Concern Review (CR) Completed
- Visitation (V) Not Completed
- Risk Reassessment (RR) Not Completed
- Case Analysis (CA) Not Completed
- Approval (A)

Case Analysis

Agency Involvement: Terminate Agency Services

Reason for Termination:

- Family No Longer in Need of Agency Services
- Risk decreased to low or moderate and no active safety threats
- Family unable to be located
- Legal Custody to Third Party
- Family Refused Services and Court decision denied
- Services Terminated Against Agency Recommendation
- Adoption Finalized
- Family moved out of state and referral made
- Only child in home deceased
- Family moved out of country and ongoing transfer denied

Upcoming Court Hearings

Describe the reasons for the case status selected above. Discuss how the risk reassessment, safety review, family perception, case progress review, including strengths and needs summary and services review informs change readiness of the family, permanency planning and service provision. If case is being closed, provide a summary justifying case closure.* (expand full screen)

Will the Family Case Plan be updated as a result of this review?

Available Update Reasons

- Addition of Case Plan Participant
- Case Closure
- Child Death
- Compelling Reasons
- Extension of Time Lines
- Modify Concerns
- Legal Status Change

Selected Update Reasons

Previous Topic Next Topic Apply Save Cancel

Note: If **Yes** is selected for 'As a result of this Review, does the Visitation Plan need to be modified?' in either the Adult Visitation details and Sibling Visitation details OR the Concern is modified or terminated, the system will default the 'Will this Family Case Plan be updated as a result of this review?' to Yes with a Selected Update Reasons of Visitation Plan and/or Modify Concerns. This will be editable to the user.

Completing the Approval Topic

If there are outstanding issues, the Approval Information page will appear with incomplete fields that need to be addressed before an Approval can be completed.

Completing a Case Review

Approval Information

Visitation

- The question "question text would go here, and could be quite long" for Smith, Tom has not been answered. - The question "question text would go here, and could be quite long" for Smith, Tom has not been answered. - The question "question text would go here, and could be quite long" for Smith, Tom has not been answered.

- The question "If an Independent Living Plan has not been developed, identify programs and life skill services which will assist the youth for independent living. Describe the progress towards the development and completion of the Independent Living Assessment/Plan." for Smith, Tom has not been answered.

Risk Reassessment - Safety factors

- The question "question text would go here, and could be quite long" for Smith, Tom has not been answered. - The question "question text would go here, and could be quite long" for Smith, Tom has not been answered. - The question "question text would go here, and could be quite long" for Smith, Tom has not been answered.

Strengths and Needs Assessment - Child Functioning

- The question "question text would go here, and could be quite long" for Smith, Tom has not been answered. - The question "question text would go here, and could be quite long" for Smith, Tom has not been answered. - The question "question text would go here, and could be quite long" for Smith, Tom has not been answered.

If there are no outstanding issues, the screen will read, *This Case Review is ready for approval.*

1. Click, **Submit for Approval.**

The screenshot shows the 'Approval Information' section of a case review. At the top, there's a breadcrumb trail: 'Case / Workload / Case Review / Approval'. Below that, a status bar indicates 'Ongoing / Open (12/09/2018)'. The main content area shows 'REVIEW TOOL: Case Review', 'REVIEW FOR PLAN: Initial Apr 15, 2019', and 'STATUS: In progress'. A green notification bar states 'Your data has been saved.' On the left, a 'Case Review Topics' sidebar lists several categories, all with 'Completed' status: 'Members to the Review', 'Safety Reassessment', 'Strengths and Needs Assessment', 'Concerns Review', and 'Visitation'. In the main content area, a 'Submit for Approval' button is highlighted with a red box. A message above the button says 'This Case Review is ready for approval.'

The **Process Approval** grid appears.

2. Make a selection from the **Action** drop-down menu.

If necessary, make a selection from the **Reviewers/Approvers** drop-down menu.

Completing a Case Review

The screenshot shows the 'Process Approval' form. At the top, there are navigation tabs: Home, Intake, Case, Provider, Financial, and Administration. Below these are sub-tabs: Alerts, Action Items, Approvals, and Assignments. The 'Process Approval' section is highlighted with a green box. It contains a 'Work Item' section with fields for ID, Task ID, Type, Task Type, CASE, Review Tool, Reference, Task Reference, and Task Status. Below this is the 'Routing/Approval Action' section, which includes an 'Action' dropdown menu (highlighted with a red box) and a 'Comments' text area. There are also 'Spell Check', 'Cancel', and 'Save' buttons. The 'Agency' field is set to 'Athens County Children Services Board'. The 'Reviewer/ Approver' dropdown menu is also highlighted with a red box. At the bottom left, there is a 'Save' button highlighted with a red box.

The **Review Tools** grid appears, displaying the **Case Review**.

The screenshot shows the 'Review Tools' grid. At the top, there are navigation tabs: Home, Intake, Case, Provider, Financial, and Administration. Below these are sub-tabs: Workload, Court Calendar, and Placement Requests. The 'Review Tools' section is highlighted with a green box. It includes a 'Review Tools Filter Criteria' section with a 'Review Tool' dropdown menu, an 'Agency' dropdown menu (set to 'Athens County Children Services Board'), and 'Approved Date' fields with 'From Date' and 'To Date' inputs. A 'Filter' button is present. Below the filter criteria is the 'Review Tools' table, which has columns for 'Plan Type', 'Review Tool', 'Status', 'Approved Date', 'Plan Name', and 'Agency'. An 'Add Review' button is located to the right of the table. The table contains one entry: 'Case Review' with a status of 'Incomplete', an approved date of '04/00/2019', and a plan name of 'Initial Apr 15, 2019'. The table is highlighted with a green box.

If you have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).