

## **CQI Webinar Transcription – May 31, 2016**

*Colleen Tucker-Buck* - Good Afternoon, I am Colleen Tucker-Buck with the Office of Families and Children. Thank you for participating in the second webinar in our series. This CQI webinar series is meant to develop a statewide level of communication and ensure all child welfare partners are in the discussion as we identify practices to improve outcomes for children and families involved with the child welfare system.

Thanks to feedback provided by many of you after our first webinar on December 2nd, the statewide CQI Advisory Team identified reporting tools as an area where many child welfare partners feel additional information would be beneficial.

Today you will be provided with a high level Overview of SACWIS and Results Oriented Management (ROM) reporting tools. Please let your colleagues know that this webinar is being recorded for those that are unavailable during today's live presentation.

Time permitting, we will taking questions at the end of the webinar but if you have questions during the webinar, please free to enter a comment in the comments box at the right of your screen.

*Kristine Monroe* - Good afternoon everyone. I am Kristine Monroe. I was the SACWIS data manager until today. I will be assuming a new role here at ODJFS but will still be involved with data and SACWIS. We are going to give a high level overview of some of what is available related to BIC, SACWIS, and ROM reporting. I know it is at times confusing when you don't necessarily know what environment to use to get specific information. I apologize for that. That is something that the SACWIS Help Desk can help you with. So if you are not sure what the best system to use is, feel free to give them a call and they can assist you.

As you can see I am logged into SACWIS. This is a SACWIS test environment. I did want to point out that we added links to ROM and BIC reporting in our last build that display on the bottom of each page in SACWIS. ROM and BIC are reporting environments that are housed outside of SACWIS. They are available to any SACWIS user who works for a public agency. They are housed within the ODJFS network so what that means is that we are not able to give access to private agencies or other involved agencies as they will not be able to access the link. If you click on the ROM link at the bottom of the SACWIS page, it will navigate you to ROM. We did have a problem with the BIC link so you can copy on the link from the SACWIS message board or you can type BIC into a separate window and you will be navigated to BIC. Typing BIC into the URL may not work for the four off-network public agencies. The BIC link will be fixed in the next SACWIS build. Because of time constraints and because our recent development focuses have been on ROM and SACWIS reports, we will be focusing on those topics today.

I am navigating back to SACWIS. There were some handouts attached to the webinar. One is a document entitled Helpful Administrative Reports in SACWIS. If you navigate in SACWIS to administration/reports, there are four pages of reports which may be a bit overwhelming. This list provides an overview of some of more helpful and recently developed reports.

Within SACWIS, there are a variety of reports within the case, intake, and provider modules but reports that are related to the entire agency are mainly housed under administration/reports. I will go through a few of the reports to demonstrate how they are structured and what is available. There are report category and report type fields at the top of the page but it is not required that you select values. I generally do not use this filter and navigate to the page where a report will likely fall based on the list being in alphabetical order. First, I am going to review the Comprehensive Visitation Report. Most of you are likely familiar with this report but the topic is so important that I want to briefly review it. To generate the report you would click on the report and then click 'Generate Report'. It defaults to Excel as do most of our reports do. You can choose to generate the report as a pdf but the text will be very small so you are likely better off generating it as an Excel file. You can enter whatever date you like. Currently we are focused on the federal fiscal year that began on 10/2015 so I will enter that date. I will enter 05/2016 as the end date since the end date cannot be future-dated to the end of the federal fiscal year. The report will default to your own agency. You will then select your population. Historically, the state has had more difficulty with adult visitation than with child visitation. When we developed this report, it was really the first time that an aggregate report was available to assist with tracking adult visitation. There are some articles on the SACWIS Knowledge Base on how the populations are created. Also, whenever you are in SACWIS, there is a version number in the bottom right-hand corner. If you click on that number, it will open the SACWIS Knowledge Base. Once on the Knowledge Base, if you want more information on the Comprehensive Visitation Report, you can type 'Comprehensive' in the search field and click search. You can see the articles that then display. The two key articles are 'Keys to Populating Data to the Comprehensive Visitation Report' and 'Generating the Comprehensive Visitation Report.' Going back to SACWIS, you will then select your population. Sometimes, you may want to generate the report for persons who have not been visited. This field is optional. Then you can select the population type. You will generally want to use option one. Options two and three will only give you summary information. If you want to see the details of who has been visited or not visited, you will want to use option one. I have created some sample reports with identifying information removed. This is what the comprehensive visitation report looks like when generated. You can see the various counts and percentages at the top of the report. As you scroll down, the detailed information will display. This will display actual case and person information. Additional information was added to the right so that specific populations can be tracked. If you want to filter, you can click on line 44 (the last header row), then click sort & filter, then click filter, you can filter by each individual column.

The next report that we will review is the Agency Safety Plan Contacts report. This is a newly developed report that was created in response to a request from a technical assistance specialist based upon feedback from one of her agencies. When CPOE reviews occur, safety plan contacts not occurring as they should is a frequently identified issues so this report was developed to assist with that. Again, you will click on the report and then click 'Generate Report'. The parameter page will default to your own agency. You can optionally filter to agency unit, supervisor, and employee. You will then select option one or option two. Most of the time you will select option two as that brings back all currently active safety plans. If you want to look at what was happening six months ago for example, you can use option one but most of the time option two will be most helpful. You will click 'Generate Report'. What this report does is list your safety plan participants. If the participant is a child then 'C' displays after the

person's name. If the contact date has an F behind it, it was a face to face contact. If it has a P behind it, it was a phone contact. A date then displays in the Next Contact Due field will display a date with the F or P to identify whether a face-to-face or a phone contact is due. This is a great tool to assist in ensuring that safety plan contacts are occurring as they should be. We did notice some data issues when testing this report so if you see records that look strange and you are not sure why they are on the report, contact the SACWIS Help Desk and they will assist with a resolution.

I also wanted to review the case reopening report. This report is also on the first page of the administrative reports list. It will bring back cases that closed during a specified period of time. If you however of the 'I' it will give you that information. Then you can identify the case reopening period that you would like to review. You can also identify what kind of opening that you are most concerned about. You will then click 'Generate Report.' This report will then show you when a case closed, why it closed, when it reopened, the intake type for the reopening, the days from closure to reopening. The report gives you the currently assigned worker and supervisor. Some feedback has been received that it would be helpful to list the worker and supervisor at the time of closure. We are working on an enhancement to add those fields.

The last SACWIS report that we will discuss is the family assessment risk contributor report. This was also released in the last SACWIS build. The report defaults to your own agency. You will identify the period of time that you are interested in. For current case status, it defaults to both. You can filter for open or closed cases if you prefer. This report is very comprehensive. It lists a record for every family assessment approved during the specified period of time. If you scroll to the right, it lists each risk contributor for the family assessment, it tells you safety threats, matrix-indicated case decision, and multiple other fields. The second tab aggregates the information for you and can be used to paint a picture of the type of cases that are opening for your agency and what your populations are. Something that is of a lot of interest is information on substance abuse cases. I have highlighted the substance abuse risk contributor on the report. As you can see, this can be used to identify the percentages of family assessments where substance abuse was identified as a risk contributor. Another column of interest is 'Number of Assessments where Final Risk Level is Intensive and Case Decision is Close.' There could be a very good reason why the unit decided the case closed but it may warrant a second look by the quality assurance department or worker. You could go back to the first tab and add filters to filter for these cases. As you can see there is a lot of additional information included in the report as well. After we developed the initial version of the report, we realized that it would be helpful to have aggregate information on cases that transferred to ongoing as well as on all cases. For example, the lower substance abuse percentages may look very differently if we only consider cases that transfer to ongoing. The SACWIS team is working to enhance the report to add this information.

There are of course many additional reports in SACWIS. Also, we wanted to point out that we are adding additional new reports with each build and we are always taking ideas. If there is anything that would be helpful to you that isn't currently in SACWIS, please submit the idea to the SACWIS Help Desk. It does take some time to create new reports but we are open to ideas. We are also working on timeliness reports that we hope to release within the next year.

Question from the audience-Will the case reopening report inform if the case was AR or traditional and what the disposition was for the traditional intakes? Answer-We are looking at adding case category at closure and opening and disposition of the traditional intakes.

Introduce Ami Faig from Butler County

*Ami Faig* -Hello. I'm Ami Faig from Butler County. SACWIS offers four pages of reports that can be used by agencies. Kristine mentioned the Comprehensive Visitation Report. We certainly do use that. We deploy it monthly to our supervisors. Our supervisory staff has also been trained on ROM and SACWIS reports so they are often generating it themselves in an effort to be proactive. So that is a tool that we have been able to utilize effectively in our agency. Later in this presentation, I will show how to use the report at a unit level. There are additional reports that we use for quality assurance purposes. One that we have historically used is the children needing permanency report. That has been used to help identify populations for permanency round tables as well as setting individual goals. For example, we have filtered the report for children in custody over 36 months and have been able to set goals to target finalization for those children. We also use the AWOL Leave report. We saw a need from our fiscal department to ensure that everything is reconciled when we go to pay the per diems to our foster networks. We noticed that we often missed leaves being entered and our quality coordinator, Kenyetta Lomax began generating this and sending it out to staff on the 5<sup>th</sup> of each month. The caseworkers use this as a tool to end-date leaves that were not ended or to enter leaves that were not entered for the month. Another report that we started pushing out to our agency this week is the identified fathers report. During CPOE 10, needs were identified for our agency that we need to ensure we are covering all resources within a family and identifying folks available for children. We pushed this report out and it was interesting as we were able to identify about 90 children without fathers identified out of over 1000 cases. We are using it as a data clean-up tool to ensure that the father information is entered correctly and to trigger the caseworker to have discussion regarding involving the fathers or the paternal side of the family. It includes a lot of valuable information, such as how the fathers were identified and at what point, as well as when the last contact with the father occurred. You can pull it for current investigations or children in custody so there are different ways to pull the report that are helpful. So that is something that we have deployed and are using as our agency progresses. There are a couple additional reports that we are using. I have been evaluating cases using the case reopening report to identify trends. We have used the screening decision timeliness report as well to monitor the health of our timeliness with screening. A supervisor is currently testing the medication detail report to use as a tool during supervision to make sure we are keeping those medications up-to-date. So those are some tools that we have been able to use in SACWIS for quality assurance and for supervision.

*Kristine Monroe*-Now we are going to look at ROM. As I stated earlier, any public agency user who has access to SACWIS is able to obtain access to BIC or ROM. In order to do that, you would fill out a JFS 07078 Code of Responsibility form and send it to Cathy Ghering with the SACWIS Help Desk. She will approve your access and INFOSEC will set it up. With BIC, your log in information is the same as your

Novell log in. With ROM, your user name is the same but your password will differ. The SACWIS Help Desk can assist if you have ROM access but need your password reset.

When you log into ROM, you will be presented with your home screen. I am going to hover over where it says my reports and then click on all reports. This screen shows all the reports that are available in ROM. There are permanency reports, child count reports, CFSR round 3 reports, supplemental CFSR reports, intake reports, racial disproportionality and disparity reports, and other categories. If only some of the reports are of interest to you, you can click inside the boxes of the reports that you want to see and save. Then when you click on my reports, it will only display the reports that you selected.

I am going to select a sample report, the Discharge Reason report. You can see we have a color coded graph where green is reunification, darker blue is adoption, lighter blue is guardianship, and the pinkish color is permanency not attained. If you hover over any of the graphs, it will give you the exact percentages. The federal definition of reunification includes custody to relatives. So you can see it is giving you a total percentage of reunifications and then is dividing them into reunification with parent or primary caregiver and living with other relatives. We have adoption and then permanency not attained. Those are divided between emancipation, transfer to another agency, runaway, and death. We also have a missing or unknown category. That is generally when the data entry isn't complete in SACWIS. Maybe custody was terminated but placement wasn't or there is some other disconnect with the data. The way that ROM works is that data is sent from SACWIS to ROM and then it populates all the reports. That is the basic way that all of the reports are structured. Say you wanted to look at all 3569 children who were reunified. You could click on the 3569 and it would open a data grid. We will not do that as it would display confidential information.

If you look at the left-hand side of each report, you will see that there are various navigation options. The reports will default to 'Statewide' when you log into ROM. You can set your agency as the default under My Reports/My Settings. You can then select your county. If your county has a juvenile court, you can select your agency or the juvenile court. You have the option of selecting the manager (unit), supervisor, and worker if you like but it is not required. The next section is Time Period. There are some reports, such as the Pending CPS reports, that are point in time, but most reports will display the last six months when you navigate to them. But say you are interested in two years of data. I will change my start date to January of 2014 and then you always need to click Apply Time Period Changes. You can see now that I have lots of information displaying in my graph. It looks a little busy and is difficult to process the fluctuations. You can then go to Compare Time Periods by and choose to change it a different option. I will change it to Quarterly. As you can see, this gives you a cleaner view of the report. You can now see how things have changed over the last few years. The counts are relatively stable but there is some fluctuation, which is to be expected. Say you wanted to know the number of children who were adopted over a period of time, this report will give you that information. We do plan to have a more detailed webinar in ROM in July. There is a lot of functionality available, such as filtering, but I am going to save that for the July webinar. I do want to point out where it says Generate Direct Link for this Page. If you are looking at something and want someone who has access to ROM to see the same report, you can click on the link and it will generate a URL for the page you are viewing. You can then copy the link and send it to the person you would like to see the report. Once they click on the link, they

will have to log into ROM. Once they are logged in, they will be navigated directly to the report that you are viewing. There is also a link that says Print Reports. If you click on this link, it will generate a pdf file of the report. You can then potentially share the pdf report with interested parties. Additionally in ROM, at the bottom of each report, additional definitions are provided. If you would like even more information on a report, you can hover over help and then click Report Definitions. It will open a help document that provides detail on each report. At the very bottom of the screen, it states 'Data current through' and then displays a date. ROM is normally a day behind SACWIS production. Occasionally, the ROM rebuild fails and it is two days behind but this is rare. The Unit in Time Period view compares down to the next Unit Level. Since I am viewing the report for the entire state, when I click on this it will compare all counties to each other. As you can see, there is significant variation in discharge reasons across counties. The crosstab in time period is a comparison view and I will not talk about that too much on this webinar.

ROM as you can see is pretty easy to use and I would recommend requesting access if you have any interest in reporting. You can play around in the application and determine if there are reports that would be of interest to your agency. I will now turn it back to Ami from Butler County.

*Ami Faig* - To reference ROM, we often receive requests from senior management to compare our performance to the performance of other agencies so we use the measures to look at the data to fulfill these requests. I am going to show you some examples of how Butler County uses this information practically. We use it both as a management tool, to monitor fiscal trends, and to attempt to forecast fiscally or with other trends. I am going to pull up what we call our Placement Trending Dashboard. We have a business analyst who we work with who is able to pull this information together from several different sources. We have a supervisor at children services who maintains a custody list-you could do this a couple different ways. We maintain our own list as we add a couple pieces of information to the report but you could use the Children in Placement report in SACWIS. We provide a monthly view of the snapshot. One the first graph you can see the green, yellow, and red background. What this means is that if we are in the green or yellow, we are managing our resources. If we get close to the red area, we need to pull our team together to do some planning to ensure we have the fiscal resources to meet our needs. We then take the placement report and break it down by the placement distribution. The first report includes children in foster care and the second report excludes them so you can get a better view of the smaller distributions. There is a Placement Type report in ROM that provides this information. We monitor our kids in group homes and residential facilities as that is a population that is costly and we want to make sure we are managing them appropriately. We have the In-Custody vs. Kinship report. We take our placement report and then generate the living arrangement report in SACWIS to pull the living arrangement report. We generate this report monthly to monitor the children in living arrangements. This length of stay graph is pretty important as well because it allows us to see the trends. On the next slide you will see a twelve month rolling period of this. We are able to see the trends for all kids. The numbers of children in care greater than 36 months is a growing population so we have initiated some programs such as permanency round tables and have some focused goals related to adoption to make sure we are managing that population as well. The in county versus out of county report is pulled from our custody list. I thought there was a report in ROM on that. Comment

from Kristine-Yes, there is a report called Placement in Same or Neighboring County in ROM. It will tell you which placements are in your county, are in a neighboring county, or are in a non-neighboring county. Ami-I have actually pulled it out of ROM and that is how we got the idea to do this but our analyst pulls the data from our placement report. Of course the goal is to keep the children within our county or in a neighboring county. We are interested in this, as are our county commissioners. We also try to keep our children in our agency homes as much as possible to we use our Agency vs. Contract report to monitor this. We also track the Monthly Cost report. We added this to our custody list report. You could pull it from SACWIS and add this column. We like to monitor the monthly cost as well as our IV-E eligibility.

This next view shows those measures on a twelve months rolling basis. This is a great tool for the senior management team and our director to see the health of the organization and the trends in each area. You can see on this view where we can do a quarterly deep dive to do some analysis and make conclusions for each measures. So those are some ways where we take the data that is available and pull it together. This is the last piece that I can show you, our quality coordinator has pulled this together and it has been an effective tool for our supervisors. This is primarily used as a supervisory tool to drive performance. We have had some good feedback from supervisors that they are using this information in their unit meetings to show their unit where they stand in comparison to the rest of the agency and is also used in individual supervision. The model allows us to see if there is a certain worker who is experiencing performance issues. Obviously within this report, we have two divisions, we pull out the visitation completed with children and adults and add the red-line to show where we are at. This is something that we are very focused on as an agency. We are starting to look at cases that reopened in less than 90 days. As I said this is a project that I am working on to identify whether there are any trends in this area. We keep an eye on our removals and of course initiations of investigations met timely. That is something that are intake director Julie Gilbert has done a really nice job on with her staff, pulling those reports out of ROM and keeping a close eye on that. We like to see a breakdown of kinship and custody placements in each unit. And for the timeliness of activity log entry, we built this to meet the need to show the timeliness of activity logs. This is a new initiative for us. Then of course we like to monitor caseload averages for each unit. We do the same things for our permanency unit, which is similar to an ongoing unit. We add a permanent custody received and reunification within twelve months report for this unit. This is a new tool and we can add additional information as it is requested by the units. This is just the data that is pulled into the graphs. Like I said, it is a living document and we are always making changes to make it more useful.

Question: What tool or software does Butler County use to create the dash board? Answer: Right now, the data is maintained in Excel. ROM and SACWIS reports can both be saved as Excel spreadsheets so we can pull the data directly from the reports. The dash board is built in PowerPoint. That is nice as you can create the graphs there and just drop in the new data each month. Our dream is to have it pull directly from these systems and we are working toward that but at this point, this is working for us. Like I said earlier, it is a matter of what your agency needs are and what your targets are and what you can create.

Suggestions: Enhancement request-On the display tickler report, add the ability to generate the report by supervisor and not just worker.

Will privates have access to additional reports? Colleen requested that they provide additional information on this request and reminded everyone that the June webinar will focus on private agency reports. It will be interactive and hopefully agencies will participate and give feedback on the reports.

*Kristine Monroe* - I want to mention that the reports are only as good as the data that is entered into SACWIS. Ami mentioned the living arrangement report. Living arrangements are a mechanism to document where the child is living when they are not with the parent and the agency does not have custody (example-grandma has TC). Some agencies do a great job of entering living arrangements and others rarely enter them. If you wanted to do a placement/living arrangement comparison like Ami showed, you would need to be sure that all living arrangements are entered into SACWIS. Another example of this is the medication detail report. This report displays all medications prescribed for children in custody. If the medication information is not entered into SACWIS, it will not display on the report.

Any feedback regarding additional reports that will be helpful can be sent to the SACWIS Help Desk. Thank you for your time.