



## Department of Job and Family Services

# *Case Management*

This packet contains the exercises listed below. Complete them at your own pace. If you need help, remember to use your User Guide, WBT, online help, or online policies. Ask the trainer for assistance if you can't find the answer to your questions in these sources.

### **What you'll do**

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**Important:** These exercises may not reflect the process flow at your county or office. They use contrived data for training purposes. Still, you can apply what you learn in class to the processes at your office.

Also: Reports cannot be generated in the training region. To become familiar with location and steps for accessing; please follow steps for accessing reports presented in the exercises. When the hour glass appears, click on "cancel".

## Exercise CM-1. Record a Case Plan

### Scenario

This exercise is the first in a series of case management exercises that follow the story of the Stone family. There are five members in the Stone family:

Fred (Wilma's husband, he is Rockette's stepfather and the biological father of Sandy and Barney)

Wilma (Fred's wife and the children's biological mother)

Rockette (older daughter)

Sandy (younger daughter)

Barney (son)

A CA/N report for physical abuse was screened in on January 3, 2005. Fred was the Alleged Perpetrator (AP), and Rockette was the Alleged Child Victim (ACV). The PCSA requested Court-Ordered Protective Supervision (COPS) for all three children, and the court awarded it on February 15, 2005.

To start your work on this case, open the case and add a family counseling service for everyone in the family. Then, create a case plan. Fred, Wilma, and the children's guardian ad litem, Brian Hunt, will sign the plan.

### Tasks

Task 1. Display the Stone case

Task 2. Update the service group for the Case Management/Casework Counseling service

Task 3. Update the service group for other services

Task 4. Add family counseling

Task 5. Add case planning services

Task 6. Add a case plan

Task 7. Record the strengths of the family

Task 8. Record concern for the parents

Task 9. Record a concern for the children

Task 10. Link services to concerns regarding the parents

Task 11. Link services to the concern for the children

Task 12. Complete exceptions information

Task 13. Complete information about independent living

Task 14. Approve the case plan

Task 15. Record signatures

Task 16. Record the guardian ad litem

**Task 1. Display the Stone case**

The Case Overview screen is the main screen for every case, so start by navigating to that screen.

1. On the Ohio SACWIS Home screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Click **Weaver##, Sam**. The system displays a list of work items.
4. Click the case ID number for the case Stone (CM)##, Wilma.  
The Case Overview screen appears.

**Result** You have displayed the main screen for the Stone case.

**Note** Be sure you've selected the Stone (CM)## case! You won't be able to finish these exercises if you haven't!

## **Task 2. Update the service group for the Case Management/Casework Counseling service**

Assign the service group that is appropriate for this phase of the case to the Case Management/Casework Counseling service.

1. In the menu on the left, click **Case Services**. The Case Services list screen appears.
2. Select Stone(CM)##, Wilma in the **Case Member** field.
3. Click **Filter**. The case services are displayed only for Wilma.
4. In the list of case services, find the Case Management/Casework Counseling service for Wilma.
5. Click **edit** in the row for that service. The Service Information screen appears.
6. Click **Add Service Group**. The Service Group History Details screen appears.
7. Select Prevention in the **Service Group** field.
8. Change the **Effective Date** of the service group to *03/01/2005*.
9. Click **OK** to return to the previous screen.
10. Click **Save**. The system saves your work and returns to the Case Services list screen.
11. Repeat steps 2 through 10 for each of the family members, filtering the display for each member.

**Result** You have assigned the Prevention service group to the Case Management/Casework Counseling service for all the members of the Stone family. When you finish you should be on the Case Services list screen.

**Task 3. Update the service group for other services**

Parent education has been recommended for Fred and Wilma, and an alcohol diagnostic service has been recommended for Fred. Update the service group for these services just as you did for the Case Management/Casework Counseling service in the previous task.

1. Find the Education & Training/Parent Education service for Wilma by using the filter function.
2. Click **edit** in the row for that service. The Service Information screen appears.
3. Click **Add Service Group**. The Service Group History Details screen appears.
4. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Service Group</b>	Prevention	
<b>Effective Date</b>	03/01/2005	

5. Click **OK** to return to the previous screen.
6. Click **Save**. The system saves your work and returns to the Case Services list screen.
7. Repeat steps 1 through 6 for the Education & Training/Parent Education service for Fred.
8. Select Fred in the **Case Member** field, then click **Filter**.
9. In the list of case services, find the Diagnostic/Alcohol Diagnostic service for Fred.
10. Click **edit** in the row for that service. The Service Information screen appears.
11. Click **Add Service Group**. The Service Group History Details screen appears.
12. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Service Group</b>	Prevention	
<b>Effective Date</b>	03/01/2005	

13. Click **OK** to return to the previous screen.
14. Click **Save**. The system saves your work and returns to the Case Services list screen.

**Result** You have assigned the Prevention service group to the other services recommended for Fred and Wilma.

**Task 4. Add family counseling**

The entire family will benefit from family counseling. Add this service for every family member. Assign a service group as you add the new service.

1. In the **Case Member Name** field at the bottom of the screen, select Wilma.
2. Click **Add Case Services**. The Service Information screen appears.
3. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Effective Date	02/25/2005	
Service Category	Counseling	
Service Type	Family Counseling	
Status	Planned	
Estimated Service End Date	04/29/2005	

4. Click **Add Service Group**. The Service Group History Details screen appears.
5. In the **Service Group** field, select Prevention.
6. Click **OK**. The system returns to the Service Information screen.
7. Click **Save**. The system saves your work and returns to the Case Services list screen.
8. Repeat steps 1 through 8 for the other four family members. Use the same information you did for Wilma.

**Result** When you finish, you should be on the Case Services list screen. The Case Services table should display separate rows for the family counseling service for Fred, Wilma, Rockette, Sandy, and Barney.

**Note** You must record paid services individually. Only non-paid services can be grouped.

### Task 5. Add case planning services

The entire family also needs the Case Management/Case Planning service. Add this service for every family member, using the Case Services Group tab.

1. Click the **Case Services Group** tab. The Case Services Group list screen appears.
2. Click **Add Case Services**. The Service Information screen appears.
3. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Effective Date	02/25/2005	
Service Category	Case Management	
Service Type	Case Planning	
Status	Planned	
Estimated Service End Date	08/31/2005	

4. In the **Case Members** list box, click the check box on the name line. All members are now selected.
5. Click **Add Service Group**. The Service Group History Details screen appears.
6. In the **Service Group** field, select Prevention.
7. Click **OK**. The system returns to the Service Information screen.
8. Click **Save**. The system saves your work and returns to the Case Services Group list screen.
9. Click the **Case Services** tab. The system returns to the Case Services screen list screen.

**Result** When you finish, you should be on the Case Services list screen. The Case Services table should display separate rows for the Case Management/Case Planning service for Fred, Wilma, Rockette, Sandy, and Barney. Notice that some of the results appear on page 2 of the list.

**Note** Non-paid services can be recorded on the Case Services Group tab. Grouped services are viewed and updated individually on the Case Services tab.

**Task 6. Add a case plan**

Add a new case plan and enter the information given below.

1. In the menu on the left, click the **Case Plan** link. The Case Plan list screen appears.
2. Click **Add Case Plan**. The Identifying Information screen appears. This is the first screen of several you'll complete as you work on the case plan.
3. In the **Case Plan Type** field, select Initial.
4. For each child, enter the following information:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Child's Permanency Goal	Maintain in own home; prevent removal	
Court Case/ID#	72595	

5. In the Additional Information area, select **Court Order Protective Supervision in Home Services - No Custody**.
6. You need to identify the judge or magistrate working with this case, so click **Person Search** beside the **Judge/Magistrate** field. The Person Search screen appears.
7. Complete the following fields, and then click **Search**:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Last Name	Rober##	
First Name	Nancy	

8. Find and select Nancy Rober in the search results. The system returns to the Identifying Information screen and displays her name in the **Judge/Magistrate** field.
9. Click **Save**.

**Result** The system saves your work and displays the Case Plan Topics screen.

**Task 7. Record the strengths of the family**

Barney and Sandy have the same non-risk contributors, so you will combine them into one strength. You will then record individual strengths for Rockette, Fred, and Wilma.

1. Click the **Strengths and Concerns** link in the table. The Strengths tab appears.
2. Click the **edit** link next to the strength for Barney.
3. In the Case Members area, select Sandy by clicking the check box beside her name.
4. Complete the following field:

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>What are the strengths? Describe why this is a strength.</b>	The children are on target physically, cognitively, and socially. There are no developmental delays in these areas. However, Sandy's preschool teacher has recently begun working with her to correct some slight speech problems.

5. Click **Save**. The system returns to the Strengths tab, where the information you added is now displayed in the table.
6. Notice the newly created non-risk contributor for Sandy and Barney. Since you have combined the two children, click the **delete** link for Sandy's individual strength.
7. Click **OK**. The non-risk contributor has been deleted.

8. Click **edit** beside Rockette's name and complete the following field:

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>What are the strengths? Describe why this is a strength.</b>	Rockette is on target physically, cognitively, and socially. Additionally, her basic needs are being met.

9. Click **Save**. The system returns to the Strengths tab.
10. Click the **edit** link next to the strength for Fred.

11. In the Case Members area, select Wilma by clicking the check box beside her name, and complete the following field:

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>What are the strengths? Describe why this is a strength.</b>	Fred and Wilma are in good physical health and do not have any emotional or mental health problems.

12. Click **Save**. The system returns to the Strengths tab.
13. Notice the newly created non-risk contributor for Fred and Wilma. Since we have combined the strength for Fred and Wilma, click the **delete** link for Wilma's individual strength.
14. Click **OK**. The non-risk contributor has been deleted.

**Result** The Strengths table has three rows: one for Barney and Sandy, one for Rockette, and one for Fred and Wilma.

**Task 8. Record concern for the parents**

The parents’ use of harsh physical discipline is a concern, as is Fred’s use of alcohol. Record these concerns in the system. Notice that a separate risk contributor has been populated from the Family Assessment for both Fred and Wilma. Fred and Wilma share the same risk contributors with the exception of substance use and cognitive abilities, which apply only to Fred. You will record one risk contributor for both Fred and Wilma and a separate risk contributor for Fred addressing substance use and cognitive abilities.

1. Click the **Concerns** tab.
2. Click the **edit** link next to the concern for Wilma.
3. In the Case Members area, select Fred by clicking the check box beside his name.
4. Complete the following fields:

<b>Field Name</b>	<b>Information to Enter/Select</b>
<b>What is the concern?</b>	The parents consistently use severe physical discipline to punish the children.
<b>What behavior will change this concern to reduce and address the safety issues of the child?</b>	Fred and Wilma will learn to use other means of discipline. Fred will not grab any of the children to get their attention or discipline them.
<b>What activities do family members need to do to make this change?</b>	Fred and Wilma will attend an agency-approved parenting program and apply the new skills they have learned at home.
<b>How will the social worker and/or service team help the family make this change?</b>	Caseworker will refer the parents to the parent education coordinator, who will help Fred and Wilma enroll in parenting classes.
<b>How will the family’s progress be measured?</b>	Progress will be measured through reports from the parenting class facilitator regarding attendance, participation, and successful completion of the class. It will also be measured by the parents’ application of new parenting skills.
<b>When will the family’s progress be reviewed?</b>	Progress will be reviewed informally during contacts and formally at the 90-day reviews and the SAR.

5. Click **Save**. The system saves your work and returns to the Concerns tab, where the information you added is now displayed in the table.
6. Click the **edit** link beside the individual concern for Fred. The system displays the Concerns Details screen. In the Selected Risk Contributors area, the only risk contributors we need to address are substance use and cognitive abilities. The other risk contributors were combined for both Fred and Wilma. The risk contributors should be highlighted.
7. Click **<Remove** to clear the Selected Risk Contributors list box.
8. Using the Ctrl key, select **Cognitive Abilities** and **Substance Use**, then click **Add>**.

9. Complete the following fields:

<b><u>Field Name</u></b>	<b><u>Information to Enter/Select</u></b>
<b>What is the concern?</b>	Fred admits to drinking daily but denies he has any problems with substance abuse.
<b>What behavior will change this concern to reduce and address the safety issues of the child?</b>	Fred will understand and acknowledge that his drinking impacts him and his family.
<b>What activities do family members need to do to make this change?</b>	Fred will obtain a drug/alcohol assessment and follow the recommendations of the assessment.
<b>How will the social worker and/or service team help the family make this change?</b>	Caseworker will make a referral for Fred to obtain a drug/alcohol assessment. Caseworker will request the results of the assessment and monitor his progress.
<b>How will the family's progress be measured?</b>	Progress will be measured by Fred obtaining a drug/alcohol assessment and by him following the recommendations. Progress will also be measured by reports from the service provider.
<b>When will the family's progress be reviewed?</b>	Progress will be reviewed informally during contacts and formally at the 90-day reviews and the SAR.

10. Click **Save**.

**Result** The system saves your work and returns to the **Concerns** tab, where the information you added is now displayed in the table.

**Task 9. Record a concern for the children**

The children are too young to protect themselves, and this is a concern.

1. Click the **edit** link next to the concern for Barney. The Concern Details screen appears.
2. In the Case Members area, select the check boxes next to Rockette and Sandy.
3. Complete the following fields:

<b>Field Name</b>	<b>Information to Enter/Select</b>
<b>What is the concern?</b>	Rockette, Sandy, and Barney are not old enough to protect themselves.
<b>What behavior will change this concern to reduce and address the safety issues of the child?</b>	Rockette, Sandy, and Barney will learn self-protection skills. They will also be taught age appropriate discipline.
<b>What activities do family members need to do to make this change?</b>	Rockette, Sandy, and Barney will work with the case aide assigned to the case to learn self-protection skills.
<b>How will the social worker and/or service team help the family make this change?</b>	Caseworker will make a referral to have a case aide assigned to the Stone family. The case aide will teach the children self-protection skills.
<b>How will the family's progress be measured?</b>	The children's progress will be measured by reports from the case aide and by them applying the new skills they learn.
<b>When will the family's progress be reviewed?</b>	Progress will be reviewed informally during contacts and formally at the 90-day reviews and the SAR.

4. Click **Save**. The system saves your work and returns to the **Concerns** tab, where the information you added is now displayed in the table.
5. Click the **delete** link for Rockette's individual concern.
6. Click **OK**. The risk contributor has been deleted.
7. Click the **delete** link for Sandy's individual concern.
8. Click **OK**. The risk contributor has been deleted.

**Result** You have replaced separate, previously entered risk contributors with a single new concern.

### Task 10. Link services to concerns regarding the parents

Link parent education and family counseling services to the concern about parenting practices. Then, link diagnostic and counseling services to the concern about Fred's alcohol abuse.

1. Click the **services** link beside the combined concern for Fred and Wilma. The Service Details screen appears.
2. Click **Link Service**. The Case Services list screen appears.
3. Click the **select** link for Education & Training/Parent Education for Wilma. The system returns to the Service Details screen and displays the service.
4. Repeat steps 2 and 3 to link the same service to Fred.
5. Click **Link Service** again.
6. Select Counseling/Family Counseling for Wilma. The system returns to the Service Details screen and displays the service.
7. Repeat steps 5 and 6 to link the same service to Fred.
8. Click **Save**. The system saves your work and returns to the **Concerns** tab.
9. Click the **services** link beside the concern about Fred's individual concern.
10. Click **Link Services**.
11. Link the Diagnostic/Alcohol Diagnostic service to the concern.
12. Click **Save** on the Service Details page.

**Result** The system saves your work and returns to the **Concerns** tab.

**Note** When updating case services it's often easier to filter the display for individual case members.

### Task 11. Link services to the concern for the children

Link the casework counseling and family counseling services to the combined concern for Rockette, Sandy, and Barney.

1. Click the **services** link beside the combined concern for Rockette, Sandy, and Barney. The Service Details screen appears.
2. Click **Link Service**.
3. Select Case Management/Casework Counseling for Rockette. The system returns to the Service Details screen and displays the service.
4. Repeat steps 2 and 3, using the following information, to finish linking services to the children:

<u>Child</u>	<u>Service(s) to Enter / Select</u>
<b>Rockette</b>	Counseling/Family Counseling
<b>Sandy</b>	Case Management/Casework Counseling Counseling/Family Counseling
<b>Barney</b>	Case Management/Casework Counseling Counseling/Family Counseling

5. Click **Save**. The system returns to the **Concerns** tab.
6. Click **Close**.

**Result** You've finished recording strengths and concerns for the case plan. The system saves your work and returns to the Case Plan Topics screen. Notice that the text in the Status column has changed to reflect your progress.

### Task 12. Complete exceptions information

There is no exceptions information to enter in this case, but you must explicitly record this by entering “N/A” in the fields on that screen.

1. Click the **Exceptions Information** link. The Exceptions Details screen appears.
2. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter / Select</u>
<b>1. Document the compelling reasons . . .</b>	N/A
<b>2. Document the reason for determining</b>	N/A

3. Click **Save**.

**Result** The system returns to the Case Plan Topics screen.

### Task 13. Complete information about independent living

Information about independent living is irrelevant because of the children’s age, but you must explicitly record this by entering “N/A” in the fields on that screen.

1. Click **Independent Living Information**. The Independent Living Details screen appears.
2. Enter “N/A” in the field **Identify programs and life skill services....**
3. Click **Save**.

**Result** The system saves your work and returns to the Case Plan Topics screen.

### Task 14. Approve the case plan

The system will check (validate) the plan and tell you if any required information is missing. Then, you will approve the plan.

1. Click **Validate for Approval**.
2. There should not be any problems, so click **Close**.
3. Click **Process for Approval**. The Process Approval screen appears.
4. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Action	Approved - Final	
Reviewers/Approvers	Weaver##, Sam	

5. Click **Save**. The system saves your approval and returns to the Case Plan Topics screen.
6. Click **Close**.

**Result** The system returns to the Case Plan list screen.

**Note** You won't normally approve your own case plans, but you will approve this plan so that you can complete subsequent exercises.

**Task 15. Record signatures**

You have reviewed the case plan with all parties, have filed it in court and have provided a copy to the parents and the guardian ad litem. Record signatures for the case plan.

1. Click the **court/signature details** link for your plan. The Additional Details screen appears.
2. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Court File Date	02/25/2005	
Court Status	Pending	

3. Click **Add Signature**. The Signature Details screen appears.

4. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Case Plan Participant	Fred Stone	
Signature Captured	Yes	
Captured Date	Today's date	The system requires that the captured date be the same as or after the date of approval.
Participated in Plan	Yes	Default
Agreed with Plan	Yes	
Date Copy of Plan Provided to Parent/Guardian/Custodian/GAL	02/25/2005	

5. Click **OK**. The system returns to the Additional Details screen.
6. Repeat steps 3 through 6 for Wilma, using the same information you used for Fred. When you finish, you should be back on the Additional Details screen. Now you're going to add someone who is not a member of the case: Brian Hunt, who will be guardian ad litem for the children.
7. Click **Add Signature**. The Signature Details screen appears.
8. In the **Case Plan Participant** field, select Non-Case Member.
9. Click **Person Search** beside the **Non-Case Member** field. The Person Search screen appears.

10. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Last Name	Hunt##	
First Name	Brian	

11. Click **Search**.

12. Find Brian in the search results and click the **select** link beside his name. The system returns to the Signature Details screen and displays Brian's name in the **Non-Case Member** field.

13. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Signature Captured	Yes	
Captured Date	Today's Date	
Participated in Plan	Yes	
Agreed with Plan	Yes	
Date Copy of Plan Provided to Parent/Guardian/Custodian/GAL	02/25/2005	

14. Click **OK**. The system returns to the Additional Details screen.

15. Click **Save**.

**Result** The system saves your work and returns to the Case Plan list screen.

### Task 16. Record the guardian ad litem

An associated person is someone involved in the case that is not an active case member (for example, a guardian ad litem, probation officer, or therapist). Record the guardian ad litem, Brian Hunt, as a person associated to the case.

1. In the menu on the left, click the **Case Overview** link. The Case Overview screen appears.
2. Click **View Case Information**. The Assignment Information screen appears.
3. Click the **Associated Persons** tab.
4. Click **Person Search**. The Person Search screen appears.
5. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Last Name	Hunt##	
First Name	Brian	

6. Click **Search**.
7. Select Brian's record in the search results. The system displays the Associated Persons Details screen.
8. In the **Association** field, select GAL.
9. Click **OK**. The system returns to the **Associated Persons** tab.
10. Click **Save**.

**Result** The system saves your work and returns to the Case Overview screen. You have completed this exercise.

## **Exercise CM-2. Prepare for the Adjudicatory Hearing**

### **Scenario**

The adjudicatory hearing for the Stone case has been scheduled for March 1, 2005.  
Record the date and time of the hearing.

### **Tasks**

- Task 1. Record the date and time of the hearing
- Task 2. Identify the attendees
- Task 3. Add information about the court

**Task 1. Record the date and time of the hearing**

Use the Hearing Segment Details screen to record the date and time of the hearing.

1. In the menu on the left, click **Court**. The Case Participants screen appears.
2. Click the **Case Legal Actions** link. The Case Legal Actions screen appears.
3. Click **Search** to see the legal actions related to this case.
4. Click **link legal action** beside the ruling dated 02/15/2005 for Rockette. The Ruling Information screen (read-only) appears.
5. In the **Legal Action** field at the bottom of the screen, select Record Hearing.
6. Click **Add Action**. The Hearing Information screen appears.
7. In the **Hearing Type** field, select Adjudicatory.
8. Click **Add Hearing Segment**. The Hearing Segment Details screen appears.
9. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Date of Hearing	03/01/2005	
Time of Hearing	2:00 PM	
Narrative	This is the adjudicatory hearing for the Stone children.	

*Do not click **Save** yet or leave this screen.*

**Result** You have recorded the date and time of the hearing.

## Task 2. Identify the attendees

You should still be on the Hearing Segment Details screen. Record the people who should attend the hearing, starting with the agency representative.

1. To complete the **Agency Representative** field, click **Person Search**. The Person Search screen appears.
2. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Last Name	Weaver##	
First Name	Sam	

3. Click **Search**.
4. Find Sam in the search results and click his **select** link. The system returns to the Hearing Segment Details screen and displays Sam in the **Agency Representative** field.
5. In the **Available Case Participants** field, select Fred and Wilma.
6. Click **Add>** to move them to the **Case Participants Attending** field.
7. Click **OK**. The system returns to the Hearing Information screen.
8. To add the children, click the **associate participants** link. The Associate Participants screen appears.
9. Select Rockette, Sandy, and Barney.
10. Click **OK**. The system returns to the Hearing Information screen.

*Do not click **Save** yet or leave this screen.*

**Result** You have identified the attendees for the hearing.

**Task 3. Add information about the court**

Use the Court Details screen to record the presiding judge, the name of the court, and the type of court.

1. Click the **Court Information** link (near the top left corner of the screen) to display the Court Details screen.
2. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Judge	Nancy Rober##	Use the <b>Person Search</b> button to find and select Judge Rober.
Court Type	Juvenile	
Court Name	Franklin County Juvenile Court	
Phone	614-728-1890	

3. Click **Save**.

**Result** The system saves your work and returns to the Legal Actions Search screen. You have completed this exercise.

## **Exercise CM-3. Record the Outcome of the Hearing**

### **Scenario**

At the adjudication and disposition hearing for the Stone children, Rockette was adjudicated abused and dependent, while Barney and Sandy were adjudicated dependent. The PCSA's Court Ordered Protective Supervision was continued for all three children.

Record all of this information in Ohio SACWIS.

### **Tasks**

- Task 1. Record the rulings for Rockette
- Task 2. Record the rulings for Sandy
- Task 3. Record the rulings for Barney

**Task 1. Record the rulings for Rockette**

The system requires you to record each ruling separately for each child. You will be recording the Adjudicatory and Dispositional rulings. Start with Rockette. (You should still be on the Legal Actions Search screen.)

1. In the Legal Action field, select Hearing.
2. Click **Search** to see all the legal actions related to the case.
3. Find the adjudicatory hearing row in the Legal Actions table and click **link legal action** in that row. The Hearing Information screen appears.
4. In the **Legal Action** field, select Ruling.
5. Click **Add Action**. The Ruling Information screen appears.
6. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Action Participant	Rockette Slate	
Date of Ruling	03/01/2005	
Hearing Status	Held	
Ruling Type	Adjudicatory	
Ruling(s) Received	Adjudicated Abused Adjudicated Dependent	To select both items together, hold down the <b>Ctrl</b> key while you click on each one. Click <b>Add&gt;&gt;</b> to move your selection to the field on the right.

7. Click **Save**. The system returns to the Legal Actions Search screen.
8. Click **Search** to display all the legal actions again.
9. Click **link legal action** for the adjudicatory hearing. The Hearing Information screen appears.
10. Select Ruling in the **Legal Action** field.
11. Click **Add Action**. The Ruling Information screen appears.
12. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Action Participant	Rockette Slate	
Date of Ruling	03/01/2005	
Hearing Status	Held	
Ruling Type	Dispositional	
Ruling(s) Received	COPS	Click <b>Add&gt;&gt;</b> to move your selection to the field on the right.

13. Click **Save**.
- Note** Be sure that you click the link for the adjudicatory hearing and not the adjudicatory ruling.

**Task 2. Record the rulings for Sandy**

Sandy was adjudicated dependent. Record her rulings.

1. Click **Search**. The system will display the legal actions related to the case.
2. Click **link legal action** for the adjudicatory hearing. The Hearing Information screen appears.
3. In the **Legal Action** field, select Ruling.
4. Click **Add Action**. The Ruling Information screen appears.
5. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Action Participant	Sandy Stone	
Date of Ruling	03/01/2005	
Hearing Status	Held	
Ruling Type	Adjudicatory	
Ruling(s) Received	Adjudicated Dependent	Click <b>Add&gt;&gt;</b> to move your selection to the field on the right.

6. Click **Save**. The system returns to the Legal Actions Search screen.
7. Click **Search** to display all the legal actions again.
8. Click **link legal action** for the adjudicatory hearing. The Hearing Information screen appears.
9. Select Ruling in the **Legal Action** field.
10. Click **Add Action**. The Ruling Information screen appears.
11. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Action Participant	Sandy Stone	
Date of Ruling	03/01/2005	
Hearing Status	Held	
Ruling Type	Dispositional	
Ruling(s) Received	COPS	Click <b>Add&gt;&gt;</b> to move your selection to the field on the right.

12. Click **Save**.

**Result** The system saves your work and returns to the Legal Actions Search screen.

**Task 3. Record the rulings for Barney**

Barney was also adjudicated dependent. Repeat the steps from the two preceding tasks to record his ruling.

1. Click **Search**. The system will display the legal actions related to the case.
2. Find the adjudicatory hearing row in the Legal Actions table and click **link legal action** in that row. The Hearing Information screen appears.
3. In the **Legal Action** field, select Ruling.
4. Click **Add Action**. The Ruling Information screen appears.
5. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Action Participant	Barney Stone	
Date of Ruling	03/01/2005	
Hearing Status	Held	
Ruling Type	Adjudicatory	
Ruling(s) Received	Adjudicated Dependent	Click <b>Add&gt;&gt;</b> to move your selection to the field on the right.

6. Click **Save**. The system returns to the Legal Actions Search screen.
7. Click **Search** to display all the legal actions again.
8. Click **link legal action** for the adjudicatory hearing. The Hearing Information screen appears.
9. Select Ruling in the **Legal Action** field.
10. Click **Add Action**. The Ruling Information screen appears.

11. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Action Participant	Barney Stone	
Date of Ruling	03/01/2005	
Hearing Status	Held	
Ruling Type	Dispositional	
Ruling(s) Received	COPS	Click <b>Add&gt;&gt;</b> to move your selection to the field on the right.

12. Click **Save**.

**Result** The system saves your work and returns to the Legal Actions Search screen. You have completed this exercise.

## **Exercise CM-4. Conduct a Case Review and Risk Reassessment**

### **Scenario**

Almost 90 days have passed since the original complaint was filed in this case, so it's time to do a case review.

### **Tasks**

- Task 1. Add a case review
- Task 2. Record a safety review
- Task 3. Record a service review of the parent's combined concern
- Task 4. Record a service review of Fred's individual concern
- Task 5. Record a service review for the children's concern
- Task 6. Record strengths and needs update
- Task 7. Complete a risk reassessment
- Task 8. Complete and approve the review

**Task 1. Add a case review**

Add the case review and link it to the initial case plan.

1. In the menu on the left, click the **Case Review/SAR** link. The Case Review/SAR list screen appears.
2. Click **Add Case Review/SAR**. The Identifying Information screen appears.
3. In the **Case Review Type** field, select 3 Month Case Review.
4. Click the link, **Select Available Case Plans**. The screen, Available Case Plans to be Reviewed, appears. This screen lists the initial case plan, which is already selected.
5. Click **OK**.  
The system returns to the Identifying Information screen and displays the case plan number in the **Case Plan being Reviewed** field. Information about participating children and adults prefills the appropriate areas on the screen.
6. Click **Save**.

**Result** The system saves your work and displays the Case Review Topics screen.

## Task 2. Record a safety review

Use the Safety Review Information screen to provide a current summary of the family's situation.

1. Click the **Safety Review** link. The Safety Review Information screen appears.
2. In the field, **Select and Complete the Appropriate Case Circumstance**, select A safety threat is not currently active.
3. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>1. Describe new information obtained regarding protective capacities....</b>	Fred and Wilma have both agreed not to use any type of physical discipline. Wilma understands that she is responsible for protecting the children from Fred and is willing to do so.
<b>2. Describe new information obtained regarding child vulnerability....</b>	There is no new information for the children. They are still vulnerable due to their ages.

4. In the Safety Response Review area, select **Maintain**.
5. Click **Save**.

**Result** The system saves your work and returns to the Case Review Topics screen. Notice that the text in the Status column changes to reflect your progress.

**Note** The system displays new fields based on your selection.

**Task 3. Record a service review of the parent's combined concern**

Assess Fred's and Wilma's progress in the parenting classes.

1. Click the **Service Review** link. The Service Review Information screen appears.
2. Click the **edit progress** link for the combined concern for Fred and Wilma. The Services Details screen appears.
3. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>Discuss the impact toward addressing safety, emerging danger, risk,...</b>	Fred and Wilma attended one appointment for family counseling on 04/26/05. they also attended the first session of parenting classes on 03/01/05 but have refused to complete the program. There has been little impact toward addressing safety and risk issues due to Fred and Wilma's refusal to complete services.
<b>Progress Addressing Concern</b>	Insufficient Progress

4. Click **Save**. The system saves your work and returns to the Service Review Information screen.
5. Click the **services** link for the combined concern for Fred and Wilma. The Service Review Details screen appears.
6. Click the check boxes located in the last column on the right. All services for this concern will be addressed in a single review on the screen.
7. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>Review Date</b>	04/29/2005
<b>Service Recommendation</b>	Continue
<b>Do Barriers Exist?</b>	Yes
<b>Barrier Type</b>	Client Refusal
<b>If Yes, Explain</b>	Fred and Wilma have decided they do not need to attend parenting classes. They have attended only one family counseling session and do not have any other appointments scheduled.

8. Click **Save**. The system saves your work and returns to the Service Review Information screen.

**Result** The service review for Fred and Wilma has been recorded and is now displayed.

**Task 4. Record a service review of Fred's individual concern**

Assess Fred's progress in regard to substance use and cognitive abilities concern.

1. Click the **edit progress** link for the combined Substance Use and Cognitive Abilities concern. The Services Details screen appears.
2. Complete the following fields:

<b>Field Name</b>	<b>Information to Enter/Select</b>
<b>Discuss the impact toward addressing safety, emerging danger, risk,...</b>	Fred has not made any progress. He continues to deny that his drinking has any effect on his family.
<b>Progress Addressing Concern</b>	Insufficient Progress

3. Click **Save**. The system saves your work and returns to the Service Review Information screen.
4. Click the **services** link for Fred's individual concern. The Service Review Details screen appears.
5. Click the check box in the far-right column. The service for this concern will be addressed from this screen.
6. Complete the following fields:

<b>Field Name</b>	<b>Information to Enter/Select</b>
<b>Review Date</b>	04/29/2005
<b>Service Recommendation</b>	Continue
<b>Do Barriers Exist?</b>	Yes
<b>Barrier Type</b>	Client Refusal
<b>If Yes, Explain</b>	Fred has failed to obtain a drug/alcohol assessment.

7. Click **Save**.

**Result** The system saves your work and returns to the Service Review Information screen. The service review for Fred is displayed.

**Task 5. Record a service review for the children’s concern**

A case aide has been working with Rockette, Sandy, and Barney to improve their ability to protect themselves. Review this service.

1. Click the **edit progress** link for the combined concern for the children. The Services Details screen appears.
2. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>Discuss the impact toward addressing safety, emerging danger, risk,...</b>	A case aide has been assigned to the Stone case and has been working with all three children on self-protection skills. Some progress has been made, but due to the children’s ages the service will be continued.
<b>Progress Addressing Concern</b>	Some Progress

3. Click **Save**. The system saves your work and returns to the Service Review Information screen.
4. Click the **services** link for the combined concern. The Service Review Details screen appears.
5. Click the check boxes located in the last column on the right. All services for this concern will be addressed in a single review on the screen.
6. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>Review Date</b>	04/29/2005
<b>Service Recommendation</b>	Continue
<b>Do Barriers Exist?</b>	No

7. Click **Save**. The system saves your work and returns to the Service Review Information screen.
8. Click **Close** on the Service Review Information screen.

**Result** You have recorded the progress toward addressing the risk contributor. The system returns to the Case Review Topics screen and displays the status.

**Task 6. Record strengths and needs update**

Strengths and needs are reviewed in four categories: child, family, adult, and historical functioning.

1. Click the **Strengths and Needs Update** link. The Strengths and Needs Update Information screen appears.
2. Complete the Child Functioning fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>Self Protection</b>	Yes
<b>Physical/Cognitive/Social Development</b>	No
<b>Emotional Functioning</b>	No

3. Complete the Family Functioning fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>Family Roles, Interactions, and Relationships</b>	No
<b>Resource Management and Household Maintenance</b>	No
<b>Extended Family, Social and Community Connectedness</b>	Yes

4. Complete the Adult Functioning fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>Cognitive Abilities</b>	No
<b>Physical Health</b>	No
<b>Emotional/Mental Health Functioning</b>	No
<b>Domestic Relations (Domestic Violence)</b>	No
<b>Substance Abuse</b>	Yes
<b>Response to Stressors</b>	Yes
<b>Parenting Practices</b>	Yes

5. Complete the Historical Functioning fields:

<b>Field Name</b>	<b>Information to Enter/Select</b>
<b>Caretaker's Victimization of Other Children</b>	No
<b>Caretaker's Abuse/Neglect as a Child</b>	Yes
<b>Impact of Past Services</b>	No

6. Complete the following fields:

<b>Field Name</b>	<b>Information to Enter/Select</b>
<b>Describe how the family and other individuals involved in the case view their own strengths and problem areas.</b>	Fred and Wilma do not see their parenting techniques as a problem. They feel they are good parents and don't see why the agency is involved.
<b>Consider the elements and the impact of provided services...</b>	Fred and Wilma's refusal to attend parenting classes have impacted their ability to use other means of discipline.
<b>Describe the most significant new information regarding underlying conditions...</b>	Fred and Wilma's refusal to learn new parenting techniques may continue to put the children at harm if they revert to using severe physical discipline.
<b>Summarize the key case activities...</b>	Caseworker has increased contacts and visits with the parents and the children to ensure the safety of the children.

7. Select **N/A - Children not placed out of the home.**

8. In the **Strength/Needs Status** field, select Completed.

9. Click **Save.**

**Result** The system saves your work and returns to the Case Review Topics screen.

**Note** To complete these fields quickly, use your **Tab** key to move from field to field. Press **Y** for Yes or **N** for No on your keyboard to select a response in each field.

### Task 7. Complete a risk reassessment

The original risk assessment was performed as part of the family assessment. The checklist used for the reassessment is the same one that was used for the original assessment.

1. Click the **Risk Reassessment** link. The Risk Reassessment Information screen appears.
2. Answer the questions in the Scores area with the following information:

<b>Field Name</b>	<b>Information to Enter/Select</b>	<b>Notes</b>
<b>Is this a non-child abuse and neglect case or child(ren) are in PC?</b>	No	You must select No to enable the other fields on the screen.
<b>R1. Number of Prior Reports</b>	b	One or Two
<b>R2. Number of Children in the Home</b>	b	Three or More
<b>R3. Number of Adults in the Home</b>	a	Two or More
<b>R4. Current Age of Primary Caregiver</b>	b	27 or younger
<b>R5. Either Caregiver Currently has Major Parenting Skills Problem</b>	b	Yes
<b>R6. Either Caregiver is Currently Involved in Harmful Relationships</b>	a	No
<b>R7. Either Caregiver has a Current Substance Abuse Problem</b>	a	No
<b>R8. New Complaints of Abuse/Neglect Since Last Assessment</b>	a	No, or complaint was unsubstantiated and screened out
<b>R9. Primary Caregiver(s) Progress Towards Case Plan Goals Since Last Assessment</b>	c	Minimal participation or refuses involvement; rarely or never demonstrates desired behavior.
<b>R10. Secondary Caregiver(s) Progress Towards Case Plan Goals Since Last Assessment</b>	c	Moderate participation in pursuing case plan objectives; occasionally demonstrates desired behavior.

3. Click **Calculate Scores**. The Policy Override Information screen appears. The score, which is High, is displayed on the Policy Override Information screen. If you change any of your answers to questions in the risk reassessment, you must click **Calculate Scores** again to update the score displayed in the system.

4. Click **Save**.

**Result** The system saves your work and returns to the Case Review Topics screen.

### Task 8. Complete and approve the review

Use the Case Analysis screen to summarize your recommendations for future actions and to submit the review to your manager.

1. Click the **Case Analysis** link. The Case Analysis screen appears.
2. Complete the following fields:

<b>Field Name</b>	<b>Information to Enter/Select</b>
<b>Agency Involvement</b>	Continue Agency Involvement – Family in need of Agency Services
<b>Protective Supervision</b>	Select this check box
<b>Describe the reasons for the case status selected above....</b>	Due to the protective capacities of the adults and the vulnerability of the children, the family must complete services to ensure the safety of the children.
<b>Case Review Completed Date</b>	04/29/2005
<b>Will the case plan be amended as a result of this review?</b>	No
<b>Do you need to complete a reunification assessment?</b>	No

3. Click **Apply**.
4. Click **Validate for Approval**. The Unresolved Case Review Plan Topics screen appears. It does not display any unresolved items, so the plan is ready for approval.
5. Click **Close**. The system returns to the Case Analysis screen.
6. Click **Process for Approval**. The Process Approval screen appears.
7. In the **Action** field, select Approved - Final. Click **Save**. The system saves the approval and returns to the Case Review Topics screen.
8. Click **Close**.

**Result** The system returns to the Case Review/SAR list screen. Now that you've approved the review, notice that you can no longer edit it: there is no **edit** link beside it in the Case Review(s)/SAR(s) table. You have completed this exercise.

**Note** In the real world, you won't approve your own work. You'll do it here, however, so that you can work through the exercises more efficiently.

## Exercise CM-5. Record a New Incident of Abuse

### Scenario

It's May 10, 2005 and your agency has received a new CA/N referral for the Stones: Fred and Rockette scuffled and Fred broke her arm. Fred also threatened Sandy and Barney. Although he didn't hurt them, law enforcement officers are going to remove all three children from the Stone home.

In this brief exercise, you're going to record the new intake, screen it in, and link it to the existing case.

### Tasks

- Task 1. Create the intake
- Task 2. Record information about the reporter
- Task 3. Add participants to the intake
- Task 4. Define the participants' roles
- Task 5. Record detailed information about the ACV and the AP
- Task 6. Define family relationships
- Task 7. Record more information about the allegation
- Task 8. Mark the intake complete (ready for a screening decision to be made)
- Task 9. Screen in the intake
- Task 10. Link the intake

**Task 1. Create the intake**

First, enter basic information such as when and how the intake was received and what kind of intake it is. Briefly describe the situation and any key events.

1. Click the **Intake** tab. Ohio SACWIS displays the Intake Workload screen.
2. Click the **Add Intake** button at the bottom of the screen. Ohio SACWIS displays the **Basic** tab for entering intake information.
3. Complete the following fields with the data provided below:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Received</b>	05/10/2005, 5:45 PM	Don't forget to select AM or PM
<b>Intake Method</b>	Phone	
<b>Intake Category</b>	CA/N Report	The <b>Intake Types</b> field is populated with appropriate choices when you select an intake category.
<b>Intake Types</b>	Physical Abuse	
<b>Intake Narrative</b>	Stepfather broke Rockette's arm.	
<b>Living Arrangement at Time of Intake</b>	Married two parent household (one biological or adoptive and one step parent).	

4. Click **Apply**.

**Write down the intake ID number: You will need it later to find this intake!**

**Result** Ohio SACWIS saves the intake and generates an Intake ID number, which is displayed at the top of the **Basic** tab. The intake will now be displayed in the list on the Intake Workload page.

## Task 2. Record information about the reporter

This report came from an officer who went to the Stone home, Officer Ben Fielding. Enter information about Officer Fielding on the **Reporter** tab.

1. Click the **Reporter** tab.
2. Select Law Enforcement in the **Reporter Type** field.
3. Next, you need to identify the officer involved. Click the **Search Person** button beside the **Reporter Name** field. The Person Search screen appears.
4. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Last Name</b>	Fielding##	
<b>First Name</b>	Ben	

5. Click **Search**. The system displays a record for Officer Fielding in the search results.
6. Click the **select** link beside Officer Fielding's name. The system returns to the **Reporter** tab, which displays Officer Fielding's name and gender.
7. Click the **Search Provider** button beside the **Organization Name** field to search for the Franklin County Sheriff's Department. The Provider Search screen appears.
8. In the **Provider Name** field, type *Franklin County Sheriff's Department##*.
9. Click **Search**. The system displays records for the sheriff's department in the search results.
10. Click the **select** link for any of the sheriff's department records. The system returns to the **Reporter** tab, which displays the department's name and contact information.
11. In the **Relationship to Alleged Victim** field, type *Law Enforcement Officer*.
12. Click **Apply** to save your work.
13. Click the **Reporter Additional** link. The Situation Knowledge Source screen appears.

14. Complete the following fields:

<b>Field Name</b>	<b>Information to Enter/Select</b>	<b>Notes</b>
<b>Observed</b>	Select this check box.	
<b>Date</b>	05/10/2005	
<b>The Reporter has Addressed Concern with the Parent/Caretaker</b>	Select this check box.	
<b>If Checked, with Whom</b>	Officer Fielding has spoken with Fred and Wilma about the incident and is supervising their contact with the children.	
<b>Last Date and Time Reporter had Contact with the ACVs</b>	Reporter is with the ACV at her home.	

15. Click **Apply**.

**Result** The system saves your work without leaving the **Reporter** tab.

**Task 3. Add participants to the intake**

Now you need to record information about the people involved in the report. All of the Stone family members have records in the system and the records are linked, so once you find one family member you can easily add the others.

1. Click the **Participants** tab.
2. Click **Search Person**. The system displays the Person Search screen.
3. Enter the information below in order to search for Wilma Stone:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Last Name</b>	Stone (CM)##	
<b>First Name</b>	Wilma	

4. Click **Search**. The system finds a record for Wilma Stone and displays it in Person Search Results.
5. Select Wilma's record.
6. Click the **Select** button. The system returns to the **Participants** tab in the intake, where Wilma has been added to the Participants table.
7. Click the **edit** link in Wilma's row. The Participant Details screen appears.
8. In the **Available Roles** field, select Parent.
9. Click **Add>** to assign this role to Wilma. The system adds your selection to the **Selected Roles** field.
10. Click **OK**. The system returns to the **Participants** tab.
11. Click **Apply** to save your work.
12. Click the **Related Persons** link beneath Wilma's name. The system displays a list of people who are linked to Wilma in existing data (the rest of the Stone family).
13. Select all the family members.
14. Click **OK**. The system saves your work and returns to the **Participants** tab.
15. Click **Apply**.

**Result** The system saves your work without leaving the Participants tab.

**Note**

To select a person in the Person Search Results table, select the check box on the same row as the name you want to select.

#### Task 4. Define the participants' roles

Now that you've assigned the family members to the intake, you need to define each person's role in the reported situation.

1. In the Participants list, click the **edit** link in Fred's row. The Participant Details screen appears.
2. In the **Available Roles** field, select Alleged Perpetrator (AP) and Caretaker. (Hold down the **Ctrl** key while you click both.)
3. Click **Add>** to assign these roles to Fred.
4. Click **OK**. The system returns to the **Participants** tab on the Intake Entry screen.
5. Repeat steps 1 through 4 to assign roles to the other family members.

<u>Person</u>	<u>Role</u>	<u>Notes</u>
<b>Rockette</b>	Alleged Child Victim (ACV)	
<b>Sandy</b>	Other Involved Child	
<b>Barney</b>	Other Involved Child	

6. Click **Apply**.

**Result** The system saves your work without leaving the **Participants** tab.

**Task 5. Record detailed information about the ACV and the AP**

After you assign a role to a participant, you can enter information that's relevant to that role. Next, you'll add information about Rockette, the ACV, and Fred, the AP.

1. On the **Participants** tab, click the **Alleged Child Victim (ACV)** link in Rockette's row. The system displays the Child Functioning screen.
  
2. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Current Behavior and Level of Functioning</b>	Unknown	
<b>Actions Taken to Reduce Risk in Own Home or Out of Home Care Setting</b>	Law enforcement officer is on the scene with the family.	
<b>Child's Current Condition</b>	ACV appears to have a broken arm.	
<b>Are There Prior Suspected Incidents of Abuse or Neglect? (drop-down list)</b>	Yes	In the text box, type: <i>The agency is currently involved with the family.</i>
<b>Is the Child Safe? (dropdown list)</b>	Yes	In the text box, type: <i>Reporter will protect child.</i>
<b>Caretaker's Ability to Protect</b>	Mother does not prevent Fred from using physical discipline.	

3. Click **Apply**. The system saves your data.
  
4. Click the **Custody/Location** link. The Custody/Location screen appears.
  
5. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Location Type</b>	Own Home	
<b>Phone</b>	614-427-9875	

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Duration Child Will Be At Current Location</b>	Until CSB arrives.	

6. Click **Save**. The system saves your work and returns to the **Participants** tab.

7. Click the **Alleged Perpetrator (AP)** link in Fred's row. Ohio SACWIS displays the Alleged Perpetrator Details screen.

8. Enter the following information about Fred:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Location Type</b>	Own Home	Ohio SACWIS displays Rockette's home address.
Phone	614-427-9875	
<b>Duration AP Will Be at Current Location</b>	Until 7:00 a.m. tomorrow	
<b>Access to Alleged Child Victim(s)</b>	Law enforcement officer is preventing access to the ACV.	
<b>Behavior and Functioning of AP</b>	Law enforcement officer states that Fred has a nasty temper. Officer believes that Fred has been arrested for assault and will be arrested for this incident.	

9. Click **Save**.

**Result** The system saves your work and returns to the **Participants** tab.

### Task 6. Define family relationships

Define the relationships between all members of the family. The system will add the reciprocal of each relationship you enter to reduce the amount of work you have to do.

1. In the Participants Relationships table, click the **edit** link for Fred Stone. The Relationships screen appears.
2. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Wilma Stone	Wife	
Rockette Slate	Stepdaughter	
Sandy Stone	Biological Daughter	
Barney Stone	Biological Son	

3. Click **Save**. The system returns to the **Relationships** tab.
4. Repeat steps 1 through 3 for Wilma:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Rockette Slate	Biological Daughter	
Sandy Stone	Biological Daughter	
Barney Stone	Biological Son	

5. Repeat steps 1 through 3 for Rockette:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Sandy Stone	Half Sister	
Barney Stone	Half Brother	

6. Repeat steps 1 through 3 for Sandy:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Barney Stone	Biological Brother	

7. You should be on the **Participants** tab. Click **Apply**.

You do not need to enter any relationships for Barney: The system has already supplied these based on the information you entered for the other family members.

**Result** The system saves your work without leaving the **Participants** tab.

**Note** Ohio SACWIS transfers relationships that have already been defined, reducing the amount of work you have to do. For example, since you defined Wilma as Fred's wife, the system has linked Fred to Wilma as her husband.

### Task 7. Record more information about the allegation

The intake narrative you enter on the **Basic** tab should cover the basic points of the allegation. The **Allegations** tab provides a place to enter information that complements or extends the information in your narrative.

1. Click the **Allegations** tab.
2. In the **Setting Type** field, select Own Home. The system displays the Stone's home address.
3. Click **Apply** to save your selection.
4. Click the **Details** link. The Allegation Details screen appears.
5. Click **Add Allegation**.
6. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Alleged Child Victim</b>	Rockette Slate	
<b>Alleged Perpetrator(s)</b>	Fred Stone	
<b>Allegation Type</b>	Physical Abuse	

7. Click **OK**. The system returns to the Allegation Details screen, which now displays information about the allegation.
8. Click **Apply**.

**Result** The system saves your work without leaving the Allegation Details screen.

**Task 8. Mark the intake complete (ready for a screening decision to be made)**

The intake is ready to be marked as complete indicating it is ready for review by the screening decision maker. Marking an intake as complete indicates that it is ready for review by a screening decision maker.

1. Click the **Basic** tab.
2. Select **Intake Completed by Screener** (it's a check box near the bottom of the **Basic** tab).
3. Click **Save**.

**Result** The system saves the intake and returns to the Intake Workload screen.

**Note** If you haven't already written down the intake ID number, take a few seconds and do it before you perform this task.

**Task 9. Screen in the intake**

Find the intake you just saved and use the Decision Details screen to screen it in. You may not be a screening decision maker at your agency, but this intake needs to be screened in for you to complete later exercises.

1. In the **Status** field, select Completed.
2. Click **Filter**. Only completed intakes are now displayed in the workload list.
3. Press **Ctrl+F**. A Find dialog box appears.
4. Type the intake ID number in the **Find what** field.
5. Click **Find Next**. The system scrolls to the intake ID number and highlights it.
6. Click **Cancel** in the Find dialog box to close it.
7. Click the **decision** link for the intake. The Decision Details screen appears.
8. Complete the following fields with the data provided:

*Important: Be certain that you change the date and time of the screening decision as instructed in the table.*

<b>Field Name</b>	<b>Information to Enter/Select</b>	<b>Notes</b>
<b>Is This an Emergency?</b>	Yes	The field <b>Response Time for Initiation</b> is automatically populated when you select Yes.
<b>Screening Decision</b>	Screened In	
<b>Date &amp; Time of Screening Decision</b>	05/10/2005 06:00 PM	

9. Click **Save**. The system displays the message: "Saving the Screening Decision will invoke 'Post-Screening Decision' edit rules. To continue click OK."
10. Click **OK**.

**Result** The system saves your decision and returns to the Intake Workload screen.

### Task 10. Link the intake

Find the Stone intake again and link it to the Stone case.

1. In the **Status** field, select Screened In.
2. Click **Filter**.
3. Find the Stone intake, either by visually scanning the list or by using the Find dialog box again.
4. Click **link** beside the Stone intake. The Link Case screen appears.
5. Click **link** for the case named **Stone, Wilma**. If you wrote down your Case ID number earlier, use it to confirm that you're linking the intake to the correct case.

**Result** The system links the intake to the Stone case and returns to the Intake Workload screen. Notice the confirmation message at the top of the screen:

“Intake #xxxxx has been linked to Case #xxxxx.”

The Stone intake is no longer displayed in the intake workload.  
You have completed this exercise.

**Note** This new CA/N report will necessitate an ongoing assessment/investigation, which you'll do in a later exercise.

## **Exercise CM-6. Record the Emergency Removal of Children from the Home**

### **Scenario**

Fred has physically abused Rockette, and law enforcement officers removed the children from the Stone home.

Record information about the removal and the legal status of the children. In addition, enter educational and medical information for Rockette.

### **Tasks**

- Task 1. Display the Stone case and view the intake
- Task 2. Record officer acceptance
- Task 3. Add a removal record for each of the children
- Task 4. Enter educational information for Rockette
- Task 5. Enter Rockette's medical provider
- Task 6. Enter information about Rockette's medical history
- Task 7. Record the initial 5-day screening
- Task 8. Record an immunization
- Task 9. Generate a health report

**Task 1. Display the Stone case and view the intake**

Navigate to the Case Overview screen for the Stone case.

1. Click the **Case** tab.
2. Click the **Workload** tab.
3. Click **Weaver##, Sam**. The system displays a list of work items.
4. Click the case ID number for the case Stone (CM)##, Wilma. The Case Overview screen appears.
5. In the menu on the left, click **Intake List**. The Intake List screen appears. The intake you just created is displayed here.

**Result** You have displayed the main screen for the Stone case and viewed linked intakes.

**Task 2. Record officer acceptance**

The children's legal status has changed. Terminate Court-Ordered Protective Supervision and record the new legal status, Officer Acceptance. Record the same information for all three children.

1. In the menu on the left, click **Court**. The Case Participants screen appears.
2. Find Rockette's row in the Case Participants table, and click the **View Legal Status History** link in that row. The Child Legal Status History screen appears.
3. Click the **edit** link for Court Ordered Prot Sup. The Child Legal Status Details screen appears.
4. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Termination Date</b>	05/10/2005	
<b>If Terminated, Reason</b>	Change in Court Order	
<b>Narrative</b>	Franklin County Sheriff's Department removed the children from the home due to alleged physical abuse.	

5. Click **Save**. The system returns to the Child Legal Status History screen, which now displays the termination date for COPS.
6. Click **Add Legal Status**. The Child Legal Status Details screen appears.
7. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Type</b>	Agency	
<b>Legal Status</b>	Officer Acceptance	
<b>Initial Agency Custody Episode</b>	Yes	System Default
<b>Effective Date</b>	05/10/2005	
<b>Effective Time</b>	5:45 PM	
<b>Narrative</b>	Law enforcement received a 911 call regarding the Stone family. Due to the seriousness of the situation the officers removed the children and notified Children Services.	
<b>Law Enforcement Report ID</b>	2005355	
<b>District ID</b>	5	
<b>Department</b>	Sheriff's Department	
<b>Officer Name</b>	Ben Fielding	
<b>Badge Number</b>	24	

8. Click **Save**. The system saves your work and returns to the Child Legal Status History screen.
9. Click **Close**. The system returns to the Case Participants screen.
10. Repeat steps 2 through 9 for Sandy and Barney. Enter the same information for each of them that you entered for Rockette.

**Result** When you finish entering Barney's information, you should be back on the Case Participants screen. Notice that each child's current legal status is displayed in the Case Participants table.

**Note** You can also enter the following changes in legal status through a child's person record: Agency Authority, Initial Voluntary Agreement for Care, and Officer Acceptance.

**Task 3. Add a removal record for each of the children**

Removal records capture information about the initial removal, including the date of the removal, the children's current legal status, and an explanation of the circumstances that justified the removal. As in the previous task, you must enter information separately for each child.

1. In the menu on the left, click the **Initial Removal** link. The Initial Removal Record list screen appears.

2. In the **Child Name** field, select Rockette.

3. Click **Add Removal Record**. The Removal Information screen appears.

4. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Current Legal Status</b>	AGENCYLGSTATUS-OA-05/10/2005	
<b>Circumstances</b>	PCSA received custody	
<b>Responsible School District</b>	Bedford City	
<b>Date Removed</b>	05/10/2005	
<b>Primary Caretaker</b>	Wilma Stone	
<b>Secondary Caretaker</b>	Fred Stone	
<b>Caretaker Structure</b>	Married Couple	
<b>Available Removal Reasons</b>	Physical Abuse	

5. Click the **Removal Circumstances** tab (at the top of the screen).

6. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Explanation: Explain why the risk of harm to the child was greater than...</b>	The continued use of severe physical discipline is greater than the emotional harm.	
<b>Explanation: State the reasonable efforts which have been made...</b>	The agency has been providing services since January of 2005, but these have not reduced the risk to the children.	

7. Click **Apply**.

8. Click the **Removal Information** tab.

9. Change the **Status** field to Completed.

10. Click **Save**. The system saves your work and returns to the Initial Removal Record list screen.

11. Repeat steps 2 through 10 to add removal records for Sandy and Barney.

**Result** When you finish entering Barney's information, you should be back on the Initial Removal Record list screen. The screen should display an initial removal record for each of the children.

**Task 4. Enter educational information for Rockette**

For the remaining tasks in this exercise, in order to save time you will only record information about Rockette.

Access Rockette's person profile from the case. Record information about her school, academic performance, and behavior.

1. Click the **Case Overview** link in the menu on the left. The Case Overview screen appears.
2. Click the **View Case Information** link. The Case Detail screen appears.
3. Click the **Members** tab.
4. Click Rockette's name in the Member List. The system displays her person profile.
5. Click the **Education** link. The system displays the **School Profile** tab.
6. Click **Add School**. The School Details screen appears.
7. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>School District</b>	Bedford	
<b>School Name</b>	Bedford	
<b>Category</b>	Public	
<b>Type</b>	Primary	
<b>Start Date</b>	08/17/2004	
<b>Beginning Grade</b>	Kindergarten	
<b>Address</b>	65020 Wintergreen Road	
<b>City</b>	Bedford City	
<b>State</b>	Ohio	
<b>Zip Code</b>	42498	
<b>School Contact</b>	Mrs. Sledgerock	
<b>Phone</b>	741-555-1122	

8. Click **Save**. The system returns to the **School Profile** tab.
9. Click the **Performance** tab.
10. In the field **Availability of Education Record**, select Available.
11. Click **Add Evaluation**. The Academic Evaluation screen appears.

12. Complete the following fields:

<b>Field Name</b>	<b>Information to Enter/Select</b>	<b>Notes</b>
<b>Evaluation Date</b>	04/01/2005	
<b>Grade Level</b>	Kindergarten	
<b>Child achieves below grade level</b>	Select this check box	
<b>Child likes school</b>	Select this check box	
<b>Cognitive Functioning</b>	Below Average	
<b>Performance Details</b>	The teacher reports that Rockette is not performing at her age level.	
<b>School Problems: Behavior</b>	Frequently	
<b>School Problems: Academic</b>	Occasionally	
<b>Behavior Problems/Social Adjustment</b>	Rockette has had problems adjusting to school. She is often disruptive in class, fidgets in her seat, and often talks to the little girl seated beside her.	
<b>Describe Child's Attendance</b>	Rockette has missed 3 days of school this year.	

13. Click **Save**.

**Result** The system saves your work and returns to the **Performance** tab.

**Task 5. Enter Rockette's medical provider**

Linking Rockette's doctor to her person profile is the first step in entering a variety of medical information.

1. Click the **Medical** link. The Health Care Provider History screen appears.
2. Click **Add Provider**. The Provider Profile Search screen appears.
3. Click **Search Provider**. The Provider Profile Search screen appears.
4. In the **Provider Name** field, type *Dr. Marble Quarry##*.
5. Click **Search**.
6. Select the record for Dr. Quarry. The system returns to the Health Care Provider Information screen and displays Dr. Quarry's name in the **Provider Name** field.
7. In the **First Visit** field, type *01/03/2003*.
8. Click **Save**.

**Result** The system saves your work and returns to the Health Care Provider History screen, where information about Dr. Quarry is displayed.

**Note** Of course you can also use a provider's ID number, if you know it, to search for them. Try searching for Dr. Quarry with the ID 15685.

**Task 6. Enter information about Rockette's medical history**

Use the **Treatment** tab to record general information about the availability of medical records and previous illnesses.

1. Click the **Treatment** tab.
2. In the field **Availability of Medical and Immunization Records**, select Available.
3. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Rubella</b>	No	
<b>Rubeola</b>	No	
<b>Chicken Pox</b>	Yes	
<b>Whooping Cough</b>	No	
<b>Mumps</b>	No	
<b>Hepatitis</b>	No	
<b>Other</b>	Unknown	Select Unknown from the drop-down list.

4. Click **Apply**.

**Result** The system saves your changes without leaving the **Treatment** tab.

**Task 7. Record the initial 5-day screening**

Use the Treatment Details screen to record the initial 5-day screening that was completed at the Health Department.

1. Click **Add Treatment**. The Treatment Details screen appears.
2. Click **Search Provider**. The Provider Profile Search screen appears.
3. In the **Provider Name** field, type *Dr. Seymour Jackson##*.
4. Click **Search**.
5. Select the record for Dr. Jackson that has your sequence number. The system returns to the Treatment Details screen.
6. Complete the following fields:

<b>Field Name</b>	<b>Information to Enter/Select</b>	<b>Notes</b>
<b>Treatment Type</b>	Medical	
<b>Primary Service Type</b>	Initial 5 Day Screening	
<b>Service Start Date</b>	05/11/2005	
<b>Service End Date</b>	05/11/2005	
<b>Procedure</b>	Dr. Jackson completed the initial 5-day placement screening for Rockette.	This field is in the Medical Treatment Information area.

7. Click **Save**.

**Result** The system saves your work and returns to the **Treatment** tab.

**Task 8. Record an immunization**

The **Immunization** tab enables you to store a child's immunization status and history. Use it to record Rockette's most recent immunization.

1. Click the **Immunization** tab.
2. In the field **Immunizations are Up-To-Date**, select Yes.
3. Click **Add Immunization**. The Immunization Information screen appears.
4. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Immunization Type</b>	Diphtheria/Tetanus/Pertussis	
<b>Date of Immunization</b>	08/10/2004	

5. Click **Save**. The system saves your work and returns to the Immunization tab.
6. Click **Save**. You are on the Members page of the Case Information screen.
7. Click **Save**.

**Result** You are returned to the Case Overview screen.

**Task 9. Generate a health report**

It is necessary to generate and save documents in Ohio SACWIS to keep a record of documents you have completed. While you may not be able to generate the health report in the training environment, consider the process for generating a document.

1. From the Case Overview screen, click **Forms/Notices** in the menu on the left.
2. Select **JFS 01443 - Child's Health Information**.
3. Click **Select**.
4. Notice that the Document History screen appears. This lists each time this document was generated and saved to the Ohio SACWIS database for the person you selected.
5. Click **Generate Report**.
6. Complete the following fields:

<b>Field Name</b>	<b>Information to Enter/Select</b>	<b>Notes</b>
<b>Select</b>	Rockette	
<b>Start Date</b>	01/01/2005	
<b>End Date</b>	Today's date	

7. Click **Generate Report**.
8. Click **Save**.

**Result** The health report is saved to the Ohio SACWIS database.

## **Exercise CM-7. Record Placement and Custody Information**

### **Scenario**

After being removed from the care of their biological parents, Rockette, Barney, and Sandy are placed in the foster home of Esteban and Elena Lopez.

Record the children's placement in the foster home. Request that temporary custody (TC) be awarded to your agency, and record information about court proceedings and rulings.

### **Tasks**

- Task 1. Record placement in the foster home
- Task 2. Request an emergency hearing
- Task 3. Record the results of the Shelter Care hearing

### Task 1. Record placement in the foster home

Add placement records separately for each child.

1. In the menu on the left, click the **Placement** link. The Placement Records list screen appears.
2. In the **Child Name** field, select Rockette Slate.
3. Click **Add Placement Record**. The Service Information screen appears.
4. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Service Type</b>	Family Foster Home	
<b>Placement Type</b>	Certified Foster Home	
<b>Emergency Placement</b>	Select this check box.	

5. Click **Link Provider**. The Provider Match Search screen appears. The **Service Category** and **Service Type** fields are prepopulated.
6. **Click** the Additional Search Criteria link under the Child Information section of the screen. In the Characteristics to be Used in Match box, **highlight** and **remove** all identified characteristics (if any).
7. Click **Search**. The system displays numerous records for Elena and Esteban Lopez.
8. In the search results, select the record that has your sequence number: Lopez, Elena & Lopez, Esteban##.

The system returns to the Service Information screen and displays the Lopez home in the Provider Information area.

9. In the **Begin Date** field, type *05/10/2005*.
10. In the Provider Information area, enter the ICCA Delivered Date as *05/11/2005*.
11. Select Non-Relative as the **Relationship to Child**.
12. In the **Status** field, select Completed.
13. Click **Save**. The system displays the message: “No previous placement exists, is the placement record the initial placement for the placement episode? Press OK to proceed with save of placement record. Clicking cancel will not save any records.”
14. Click **OK** to close the dialog box. The system returns to the Placement Records list screen.
15. Repeat steps 2 through 14 for Barney and Sandy.

**Result** You’ve added a placement record for each child. After the last step, you should be on the Placement Records list screen.

## Task 2. Request an emergency hearing

You want the PCSA's current Court Ordered Protective Supervision to be changed to TC. Create a motion requesting an emergency hearing. As a result of this motion, a Shelter Care hearing will occur.

1. In the menu on the left, click the **Court** link. The Case Participants screen appears.
2. Click the **Case Legal Actions** link. The Case Legal Actions screen appears.
3. In the **Legal Action** field, select Hearing.
4. Click **Search**.
5. Click **link legal action** beside the hearing dated 3/1/2005.
6. In the **Legal Action** field, select Create Motion.
7. Click **Add Action**. The Create Motion Details screen appears.
8. To complete the **Motion Filed By** field, click **Search Person** beside the field. The Person Search screen appears.
9. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Last Name	Weaver##	
First Name	Sam	

10. Click **Search**.
11. Find Sam in the search results and click the **select** link beside his name. The system returns to the Create Motion Details screen and displays Sam's name in the **Motion Filed By** field.
12. Repeat steps 8 through 11 to enter Sam in the **Motion Created By** field. (Use the **Search Person** button beside this field.)

13. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Type of Motion</b>	Modify/Change Dispositional Order	
<b>Sub-Type</b>	Custody to Agency	
<b>Date Submitted</b>	05/11/2005	
<b>Method of Motion</b>	Written	
<b>Motion Supported by Affidavit</b>	Yes	
<b>Motion To</b>	Modification of the order of protective supervision to an order of TC for Rockette, Sandy, and Barney.	
<b>Motion States</b>	The agency received emergency temporary custody through officer acceptance of Rockette, Sandy, and Barney due to an incident of physical abuse.	
<b>Best Interest Motion Statement</b>	PCSA requests that the court include a best interest statement.	
<b>Reasonable Effort Determination Motion</b>	The agency has been involved with the Stone family since January of 2005 and has been providing services.	

14. Click **Add Participant**. The Motion Participant Details screen appears.

15. In the Action Participants area, select Barney, Sandy, and Rockette.

16. In the Preferred Disposition/Outcome area, complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Preferred Primary Disposition/Outcome</b>	TC to agency	
<b>Preferred Secondary Disposition/Outcome</b>	COPS	
<b>Guardian Ad Litem</b>	Brian Hunt##	Use the <b>Search Person</b> button beside this field to find and select Brian Hunt.

17. Click **OK**. The system returns to the Create Motion Details screen. The children are now listed in the Action Participant(s) area.

18. Click **Save**.

**Result** The system saves your work and returns to the Legal Actions Search screen.

**Task 3. Record the results of the Shelter Care hearing**

The Shelter Care hearing has been held. The PCSA was awarded TC, and an adjudication hearing was scheduled for May 27, 2005. Record the rulings and the resulting change in legal status. You must record this information separately for each child.

1. In the **Legal Action** field, select Motion
2. Click **Search**.
  
3. Click the **link legal action** link for the motion (dated 05/11/2005) to modify/change the dispositional order. The Create Motion Details screen appears.
  
4. In the **Legal Action** field, select Record Ruling.
  
5. Click **Add Action**. The Ruling Information screen appears.
  
6. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Action Participant</b>	Rockette Slate	
<b>Date of Ruling</b>	05/11/2005	
<b>Hearing Status</b>	Held	
<b>Ruling Type</b>	Shelter Care	
<b>Rulings Received</b>	Best Interest; RE to Prevent Placement – Initial; TCO	

7. Click **Add>>**.
  
8. In the Legal Status Information area, click the **Terminate** link for Officer Acceptance. The Child Legal Status Details screen appears.
  
9. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Terminate Date</b>	05/11/2005	
<b>If Terminated, Reason</b>	Change in Custody Type	
<b>Custody Episode Terminated</b>	No	
<b>Narrative</b>	Officer Acceptance was terminated due to the agency receiving TCO.	

10. Click **OK**. The system returns to the Ruling Information screen.
  
11. Click **Add Legal Status**. The Child Legal Status Details screen appears.

12. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Type</b>	Agency	
<b>Legal Status</b>	Temporary Court Order	
<b>Effective Date</b>	05/11/2005	

13. Click **OK**. The system returns to the Ruling Information screen.

14. Click **Save**. The system returns to the Legal Actions list screen.

15. Repeat steps 1 through 13 for Sandy and Barney. Enter the same information given above.

**Result** The system saves your work and returns to the Legal Actions list screen. You have completed this exercise.

**Note** Add the new narrative text below the original narrative to retain the explanation of why the children came into custody.

## Exercise CM-8. Amend the Case Plan

### Scenario

Because the Stone children have been removed from their home and are now in the custody of the PCSA, an amended case plan must be filed with the court within three days of the removal. The amendment will cover a variety of topics, including:

- Services for the children and the caregivers
- The visitation plan
- Details about the Lopez foster home
- Placement information

### Tasks

- Task 1. Update the Case Management/Case Planning service
- Task 2. Update the Case Management/Casework Counseling service
- Task 3. Update the Education & Training/Parent Education service
- Task 4. Update the Diagnostic/Alcohol Diagnostic Services
- Task 5. Update the Counseling/Family Counseling Service
- Task 6. Add an individual counseling service for Rockette
- Task 7. Add a caregiver service
- Task 8. Add speech therapy for Sandy
- Task 9. Authorize Sandy's speech therapy
- Task 10. Record visitation plans
- Task 11. Complete amendment information
- Task 12. Update identifying information
- Task 13. Update the concern for the children
- Task 14. Add a concern for Sandy's speech problem
- Task 15. Update the concerns for the parents
- Task 16. Link services to the concerns
- Task 17. Record placement information
- Task 18. Link visitation plans
- Task 19. Link caregiver services
- Task 20. Approve the amendment

### Task 1. Update the Case Management/Case Planning service

Assign the service group that is appropriate for this phase of the case and link the service to a provider.

1. In the menu on the left, click **Case Services**. The Case Services list screen appears.
2. In the list of case services, find the Case Management/Case Planning service for Wilma.
3. Click **edit** in the row for that service. The Service Information screen appears.
4. In the **Status** field, select Provided.
5. Click **Add Service Group**. The Service Group History Details screen appears.
6. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Service Group</b>	Reunification Group	
<b>Effective Date</b>	05/12/2005	

7. Click **OK** to return to the previous screen.
8. Click **Link Provider**. The Provider Match Search screen appears.
9. Click **Search**.
10. In the search results, select Franklin County Children Services Board##. The system returns to the Service Information screen and displays this provider in the Provider Information area.
11. In the **Begin Date** field, type *03/01/2005*.
12. Click **Save**. The system saves your work and returns to the Case Services list screen.
13. Repeat steps 2 through 13 for each of the family members.

**Result** You have assigned the Reunification group to the Case Management/Case Planning service for all the members of the Stone family. When you finish you should be on the Case Services list screen.

**Note** Grouped services are viewed and updated individually, for each case member.

## Task 2. Update the Case Management/Casework Counseling service

Change the service group to Reunification to reflect the current phase of the case and change the effective date.

1. In the list of case services, find the Case Management/Casework Counseling service for Wilma.
2. Click **edit** in the row for that service. The Service Information screen appears.
3. Click **Add Service Group**. The Service Group History Details screen appears.
4. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Service Group</b>	Reunification Group	
<b>Effective Date</b>	05/12/2005	

5. Click **OK** to return to the previous screen.
6. Click **Save**. The system saves your work and returns to the Case Services list screen.
7. Repeat steps 1 through 6 for the other family members.

**Result** You have updated the service group for the Case Management/Casework Counseling service.

### Task 3. Update the Education & Training/Parent Education service

Update the service group and link a provider to the service.

1. In the list of case services, find the Education & Training/Parent Education service for Wilma.
2. Click **edit** in the row for that service. The Service Information screen appears.
3. In the **Status** field, select Provided.
4. Click **Add Service Group**. The Service Group History Details screen appears.
5. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Service Group</b>	Reunification Group	
<b>Effective Date</b>	05/12/2005	

6. Click **OK** to return to the previous screen.
7. Click **Link Provider**. The Provider Match Search screen appears.
8. Click **Search**.
9. In the search results, select Parents Helping Parents##. Ohio SACWIS returns to the Service Information screen and displays this provider in the Provider Information area.
10. In the **Begin Date** field, type *03/01/2005*.
11. In the **Estimated End Date** field, type *03/31/2005*.
12. Click **Save**. The system saves your work and returns to the Case Services list screen.
13. Repeat steps 1 through 12 for the Education & Training/Parent Education service for Fred.

**Result** You have assigned the Reunification group to the Education & Training/Parent Education service and linked a provider. When you finish you should be on the Case Services list screen.

#### Task 4. Update the Diagnostic/Alcohol Diagnostic Services

Assign the Reunification group to this service.

1. In the list of case services, find the Diagnostic/Alcohol Diagnostic service for Fred.
2. Click **edit** in the row for that service. The Service Information screen appears.
3. Click **Add Service Group**. The Service Group History Details screen appears.
4. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Service Group</b>	Reunification Group	
<b>Effective Date</b>	05/12/2005	

5. Click **OK** to return to the previous screen.
6. Click **Save**.

**Result** The system saves your work and returns to the Case Services list screen. You have updated this service.

### Task 5. Update the Counseling/Family Counseling Service

Update the service group and link a provider.

1. In the list of case services, find the Counseling/Family Counseling service for Wilma.
2. Click **edit** in the row for that service. The Service Information screen appears.
3. In the **Status** field, select Provided.
4. Click **Add Service Group**. The Service Group History Details screen appears.
5. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Service Group</b>	Reunification Group	
<b>Effective Date</b>	05/12/2005	

6. Click **OK** to return to the previous screen.
7. Click **Link Provider**. The Provider Match Search screen appears.
8. Click **Search**.
9. In the search results, select Rolling Stone Counseling Center##. The system returns to the Service Information screen and displays this provider in the Provider Information area.
10. In the **Begin Date** field, type *04/26/2005*.
11. In the **Estimated End Date** field, type *07/29/2005*.
12. Click **Save**. The system saves your work and returns to the Case Services list screen.
13. Repeat steps 1 through 12 for each of the family members.

**Result** You have assigned the Reunification group to this service and linked a provider. When you finish you should be on the Case Services list screen.

**Note** Updates to a grouped serviced are recorded individually, for each case member.

### Task 6. Add an individual counseling service for Rockette

You have decided to add individual counseling for Rockette to address protection issues. Normally you might add the service for all three children, but you will only enter it for Rockette in this exercise.

1. In the **Case Member Name** field at the bottom of the screen, select Rockette.
2. Click **Add Case Services**. The Service Information screen appears.
3. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Effective Date</b>	05/12/2005	
<b>Service Category</b>	Counseling	
<b>Service Type</b>	Individual Counseling	

4. Click **Apply** to save your work.
5. Click **Add Service Group**. The Service Group History Details screen appears.
6. In the **Service Group** field, select Reunification Group.
7. Click **OK**. The system returns to the Service Information screen.
8. Click **Link Provider**. The Provider Match Search screen appears.
9. To search for suitable providers, select Private in the **Agency Type** field.
10. Click **Search**.
11. In the search results, select Rolling Stone Counseling Center##. The system returns to the Service Information screen, where Rolling Stone is displayed in the Provider Information field.
12. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Status</b>	Provided	
<b>Service Begin Date</b>	05/12/2005	
<b>Estimated Service End Date</b>	07/29/2005	

13. Click **Save**.

**Result** The system saves your work and returns to the Case Services list screen.

### Task 7. Add a caregiver service

Caregiver services are linked to the substitute caregiver through the child placed in that home. The agency will provide respite care for Rockette's foster parents.

1. In the **Case Member Name** field, select Rockette.
2. Click **Add Case Services**. The Service Information screen appears.
3. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Effective Date</b>	05/12/2005	
<b>Service Category</b>	Child Care	
<b>Service Type</b>	Respite Care	
<b>Status</b>	Planned	
<b>Estimated Service End Date</b>	07/29/2005	

4. In the Current Substitute Caregiver area, select **Elena & Esteban Lopez**.
5. Click **Add Service Group**. The Service Group History Details screen appears.
6. In the **Service Group** field, select Reunification Group.
7. Click **OK**. The system returns to the Service Information screen.
8. Click **Save**.

**Result** The system saves your work and returns to the Case Services list screen.

### Task 8. Add speech therapy for Sandy

The Rolling Stone Counseling Center also provides speech therapy that will help Sandy's speech problem. Add speech therapy for Sandy.

1. In the **Case Member Name** field, select Sandy.
2. Click **Add Case Services**. The Service Information screen appears.
3. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Effective Date</b>	05/12/2005	
<b>Service Category</b>	Home Related & Home Health	
<b>Service Type</b>	Speech Therapy	
<b>Status</b>	Provided	

4. Click **Add Service Group**. The Service Group History Details screen appears.
5. In the **Service Group** field, select Reunification Group.
6. Click **OK**. The system returns to the Service Information screen.
7. Click **Link Provider**. The Provider Match Search screen appears.
8. Click **Search**.
9. In the search results, select Rolling Stone Counseling Center##. The system returns to the Service Information screen, where the selected provider is displayed in the Provider Information field.
10. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Service Begin Date</b>	05/12/2005	
<b>Estimated Service End Date</b>	08/31/2005	

11. Click **Save**.

**Result** The system saves your work and returns to the Case Services list screen. A new row displays information about Sandy's service.

### Task 9. Authorize Sandy's speech therapy

You will now authorize the speech therapy service for Sandy. You may not be responsible for this at your agency (nor have the security profile), but by performing the task in this exercise you will be able to see the authorization process.

**NOTE: Skip this task. Proceed on to Task 10.**

1. In the **Case Member** field (above the **Filter** button), select Stone, Sandy.
2. Click **Filter** to display only the services for Sandy.
3. In the row for the speech therapy services, click the **authorize** link. The Service Authorization Detail screen appears.
4. Type *10* in the **Units** field.
5. Type *75.00* in the **Basic Cost** field.
6. Click **Calculate**.
7. Click **Apply**.
8. Click **Process for Approval**. The Process Approval screen appears.
9. In the **Action** field, select Routed.
10. Click **Save**. The system saves your work and returns to the Service Authorization Detail screen.
11. Click **Save**.

**Result** The system saves your work and returns to the Case Services list screen.

**Task 10. Record visitation plans**

A visitation plan can be added as a stand-alone plan when the agency is providing court-ordered visitation. A visitation plan is also added for children in the custody of the agency. Create visitation plans for the three Stone children. (The plans are recorded now so that they will be available to link to the case plan later.)

1. Click the **Visitation Plans** link. The Visitation Plans list screen appears.
2. Click **Add Visitation Plan**. The Visitation Information Details screen appears.
3. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Child Name</b>	Rockette Slate	
<b>Effective Date</b>	05/12/2005	

4. Click **Add Visitation Information**. The Visitation Information Details screen appears.
5. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Effective Date</b>	05/12/2005	
<b>Member Who May Visit</b>	Wilma Stone	
<b>How Often</b>	Once a week	
<b>How Long (Duration)</b>	Less than 2 hours	
<b>Where</b>	Other	
<b>Other Location Information</b>	Any agency-approved location	
<b>Restricted Visit</b>	Yes	
<b>Supervised Visit</b>	Yes	
<b>State the restriction on visitation...</b>	Visitation is restricted due to the mother's inability to protect the children and her denial that severe physical discipline is inappropriate.	
<b>Other Approved Communication</b>	Letters and phone calls via the caseworker	

6. Click **OK**. The system returns to the Visitation Plans Details screen.
7. In the **Status** field, select Completed.

8. Click **Save**. The system returns to the Visitation Plans list screen.

To complete visitation plans for Sandy and Barney, you will copy the plan you just created and make any changes necessary for them.

9. Click the **copy** link for the visitation plan you just created for Rockette. The Visitation Plans Details screen appears.

10. In the **Child Name** field, select Sandy Stone.

11. In the **Status** field, select Completed.

12. Click **Save**. The system saves your work and returns to the Visitation Plans list screen.

13. Repeat steps 9 through 12 to add a visitation plan for Barney.

**Result** When you finish, you should be on the Visitation Plans list screen, which should display a visitation plan for each of the three children.

**Note** The **copy** link on the Visitation Plans list screen copies the whole visitation plan. There is also a **copy** link on the Visitation Plans Details screen: that link copies visitation information for a case member who may visit.

**Task 11. Complete amendment information**

To begin, update the information on the Identifying Information screen.

1. In the menu on the left, click the **Case Plan** link. The Case Plan list screen appears.
2. Click the **amend plan** link for the initial plan. The Amendment Information screen appears.
3. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Amended Case Plan Changes</b>	Legal Status Change Services Permanency Goal Visitation Plan	Select all four, then click <b>Add&gt;&gt;</b> . (To select multiple items, hold down the <b>Ctrl</b> key while you click all the items.)
<b>Changes</b>	Identifying Information: Legal Status, Placement Information, and Permanency Goal Services Added: Individual Counseling for Rockette, speech therapy for Sandy, and caregiver services Section 3: Visitation plan Section 4: Removal information Section 5: Placement information	
<b>Reasons</b>	Mrs. Stone was unable to protect her children from further physical abuse by Mr. Stone and another incident occurred. The children were placed in the agency's custody. Services were added for the substitute caregivers and visitation was added to the Case Plan.	
<b>Is this an Emergency</b>	Yes	
<b>If Yes, Explain Why, the Date of Action,...</b>	On May 10, 2005, the agency received another referral of physical abuse involving the Stone children. As a result of the report, all three children were placed in the same out-of-home placement. Juvenile Court, the guardian ad litem, and the parents were all notified on May 10, 2005.	

4. Click **Save**.

**Result** The system saves your work and displays the Case Plan Topics screen.

**Task 12. Update identifying information**

Record the permanency goal for all three children.

1. Click the **Identifying Information** link. The Identifying Information screen appears.
2. In the Child(ren) Participating in the Case Plan table, complete the following field for all three children:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Child's Permanency Goal</b>	Return the child(ren) to parent/guardian/or custodian (Reunification)	

3. In the Additional Information area, clear the check box **Court Order Protective Supervision in Home Services - No Custody**.
4. Click **Save**.

**Result** The system saves your work and returns to the Case Plan Topics screen.

### Task 13. Update the concern for the children

You are concerned about the children's ability to protect themselves. You created a concern for self-protection in the initial case plan. Now, update this concern with new information.

1. Click the **Strengths and Concerns** link. The Strengths screen appears.
2. Click the **Concerns** tab.
3. Click the **edit** link for the combined concern for the children. The Concern Details screen appears.
4. Revise the information in the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>What activities do family members need to do to make this change?</b>	Rockette, Sandy and Barney will participate in family counseling to learn self-protection skills.
<b>How will the social worker and/or service team help the family make this change?</b>	Substitute caregivers will reinforce protection skills at home. Caseworker will advise substitute caregivers of the scheduled appointments for family counseling. The substitute caregivers will ensure that the children attend all scheduled appointments.
<b>How will the family's progress be measured?</b>	Progress will be measured by reports from the therapist and by the children displaying self-protection skills.

5. Click **Save**.

**Result** The system saves your work and returns to the **Concerns** tab.

**Task 14. Add a concern for Sandy’s speech problem**

You have identified a need for services to address Sandy’s speech problem. Now add a concern for the speech problem.

1. Click **Add Concern**. The Concerns Details screen appears.
2. Select Sandy in the Case Members list.
3. In the **Available Risk Contributors** field, select Physical/Cognitive/Social Development.
4. Click **Add >** to move your selection to the **Selected Risk Contributors** field.
5. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>What is the Concern?</b>	Sandy's speech problem has increased and her teacher has recommended that she receive speech therapy.
<b>What behavior will change this concern to reduce and address the safety issues of the child?</b>	Sandy will learn to speak clearly in order to communicate with others.
<b>What activities do family members need to do to make this change?</b>	Sandy will attend speech therapy on a regular and consistent basis to address her speech impediments.
<b>How will the social worker and/or service team help the family make this change?</b>	Caseworker will make a referral to Rolling Stone Counseling Center for an assessment to be completed for Sandy's speech and arrange any follow up service that is recommended.
<b>How will the family's progress be measured?</b>	Sandy's progress will be measured by reports from the speech therapist, by her speech becoming more clear and concise, and by Caseworker observation.
<b>How will the family's progress be reviewed?</b>	Progress will be reviewed informally during contacts and formally at the 90-day review and the SAR.

6. Click **Save**.

**Result** The system saves your work and returns to the **Concerns** tab.

### Task 15. Update the concerns for the parents

You need to update a few fields for the combined concern for Fred and Wilma and the individual concern for Fred.

1. Click the **edit** link for the combined concern for Fred and Wilma. The Concerns Details screen appears.
2. Revise the information in the following fields:

<b>Field Name</b>	<b>Information to Enter/Select</b>
<b>What behavior will change this concern to reduce and address the safety issues of the child?</b>	Fred and Wilma will learn to use other means of discipline. During visits, Fred and Wilma will not grab any of the children or use any type of physical discipline.
<b>How will the social worker and/or service team help the family make this change?</b>	Caseworker will request progress reports from the service providers and make home visits to observe application of new skills.

3. Click **Save**. The system saves your work and returns to the **Concerns** tab.
4. Click the **edit** link for the individual concern for Fred.
5. Complete the following fields:

<b>Field Name</b>	<b>Information to Enter/Select</b>
<b>What activities do family members need to do to make this change?</b>	Fred will obtain a drug/alcohol assessment within the next thirty days and follow the recommendations of the assessment.
<b>How will the social worker and/or service team help the family make this change?</b>	Caseworker will request the results of the assessment and monitor his progress.

6. Click **Save**.

**Result** The system saves your work and returns to the **Concerns** tab.

## Task 16. Link services to the concerns

Link the services you created earlier to the case plan concerns.

1. On the **Concerns** tab, click the **services** link for the combined concern for the children. The Service Details screen appears.
2. Click **Link Service**. The Case Services list screen appears.
3. In the **Case Member** field, select Rockette.
4. Click **Filter**.
5. Select the Counseling/Individual Counseling service for Rockette. The system returns to the Service Details screen, which now displays the service.
6. Click **Save**. The system returns to the **Concerns** tab.
7. Click the **services** link for the concern regarding Sandy's speech problem. The Service Details screen appears.
8. Click **Link Service**. The Case Services list screen appears.
9. In the **Case Member** field, select Sandy.
10. Click **Filter**.
11. Select the Health Related & Home Health/Speech Therapy service for Sandy. The system returns to the Service Details screen, which now displays the service.
12. Click **Save**. The system saves your work and returns to the **Concerns** tab.
13. Click **Close**.

**Result** The system returns to the Case Plan Topics screen.

**Task 17. Record placement information**

Describe the reason for placing the children in the Lopez foster home and explain how the placement meets the children’s needs.

1. Click the **Placement Information** link on the Case Plan Topics screen. The **Settings** tab appears.
2. Under Rockette’s name in the Settings Details table, click the **edit** link for each of the following fields to display a Narrative Details screen. Enter the text shown here in the **Describe** field on each Narrative Details screen. Click **Save** to return to the **Settings** tab between each entry.

**Note** You may need to scroll to find Rockette’s name in the table.

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Own Home</b>	Rockette is in the custody of the agency and cannot remain in her own home.	
<b>Certified/Approved Relative - CAR</b>	No certified or approved relative homes were available.	
<b>Certified/Approved Non-Relative</b>	No certified or approved non-relative homes were available.	
<b>Other</b>	N/A	

3. Repeat step 2 for Sandy and Barney. Enter the same information in the same fields for each of them that you entered for Rockette. When you finish, you should be on the **Settings** tab.
4. Click the **Placement** tab. Notice that the Placement Details table is organized with a set of questions for each child, just as the table on the **Settings** tab is organized.
5. Under Rockette’s name, click the **edit** link for each of the following fields to display a Narrative Details screen. Enter the text shown here on each Narrative Details screen, then click **Save** to return to the **Placement** tab.

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>How was it determined this was a safe and appropriate environment for the child?</b>	The current placement is safe because it meets all the site and safety licensing requirements of ODJFS. It is appropriate because the foster parents are trained to meet Rockette's needs.
<b>How will the placement meet the best interest of the child?</b>	The current placement will meet Rockette's best interests because the foster parents are specifically trained to help children who have been removed from their biological parents.
<b>How will the placement meet the Case Plan Goals of the Child?</b>	The current placement will meet the goals by contributing to the development and implementation of the case plan.
<b>How will the placement meet the special needs of the child?</b>	The current placement will meet Rockette's special needs because the foster parents are experienced in helping children with behavioral problems.

<b>What is the proximity of the placement to the parent, guardian, custodian?...</b>	The current placement is approximately ten miles from the Stone's home. The Stones have reliable transportation, but if transportation issues arise, the agency will make a referral for transportation assistance.
<b>When selecting a substitute care placement setting, describe how the agency...</b>	Rockette will be attending the same school she was attending prior to placement.

6. Under Sandy's name, click the **edit** link for each of the following fields to display a Narrative Details screen. Enter the text shown here on each Narrative Details screen, then click **Save** to return to the **Placement** tab.

<b>Field Name</b>	<b>Information to Enter/Select</b>
<b>How was it determined this was a safe and appropriate environment for the child?</b>	The current placement is safe because it meets all the site and safety licensing requirements of ODJFS. It is appropriate because the foster parents are trained to meet Sandy's needs.
<b>How will the placement meet the best interest of the child?</b>	The current placement will meet Sandy's best interests because the foster parents are specifically trained to help children who have been removed from their biological parents.
<b>How will the placement meet the Case Plan Goals of the Child?</b>	The current placement will meet the goals by contributing to the development and implementation of the case plan.
<b>How will the placement meet the special needs of the child?</b>	The foster parents will ensure that Sandy completes the exercises assigned by the speech therapist. They will also ensure that she attends all scheduled appointments with the speech therapist.
<b>What is the proximity of the placement to the parent, guardian, custodian?...</b>	The current placement is approximately ten miles from the Stone's home. The Stones have reliable transportation, but if transportation issues arise, the agency will make a referral for transportation assistance.
<b>How will the placement meet the special needs of the child?</b>	Sandy will be attending the same preschool she attended prior to placement.

7. Under Barney's name, click the **edit** link for each of the following fields to display a Narrative Details screen. Enter the text shown here on each Narrative Details screen, then click **Save** to return to the **Placement** tab.

<b>Field Name</b>	<b>Information to Enter/Select</b>
<b>How was it determined this was a safe and appropriate environment for the child?</b>	The current placement is safe because it meets all the site and safety licensing requirements of ODJFS. It is appropriate because the foster parents are trained to meet Barney's needs.
<b>How will the placement meet the best interest of the child?</b>	The current placement will meet Barney's best interests because the foster parents are specifically trained to help children who have been removed from their biological parents.
<b>How will the placement meet the Case Plan Goals of the Child?</b>	The current placement will meet the goals by contributing to the development and implementation of the case plan.
<b>How will the placement meet the special needs of the child?</b>	The current placement will meet Barney's special needs because the foster mother has a degree in early childhood development.

<b>What is the proximity of the placement to the parent, guardian, custodian?...</b>	The current placement is approximately ten miles from the Stone's home. The Stones have reliable transportation, but if transportation issues arise, the agency will make a referral for transportation assistance.
<b>How will the placement meet the special needs of the child?</b>	N/A - Barney is not attending school due to his young age.

8. You should be on the **Placement** tab after you've entered all of Barney's information.

9. Click **Close** to return to the Case Plan Topics screen.

**Result** You have completed the Placement Information section of the case plan.

### **Task 18. Link visitation plans**

Earlier in this exercise, you created visitation plans for Rockette, Sandy, and Barney. Link these visitation plans to the amended case plan.

1. Click **Placement Visitation**. The Visitation(s) Details screen appears.
2. Click **Link Visitation**. The Visitation Plans list screen appears.
3. Select the visitation plans for all three children.
4. Click **OK**. The system returns to the Visitation(s) Details screen, which now displays the visitation plans for Rockette, Sandy, and Barney.
5. Click **Save**.

**Result** The system saves your work and returns to the Case Plan Topics screen.

### **Task 19. Link caregiver services**

Link the respite service for the foster parents to the case plan.

1. Click **Caregiver Services**. The Service(s) Details screen appears.
2. Click **Link Service**. The Case Services list screen appears.
3. Select the Child Care/Respite service next to Rockette.
4. Click **OK**. The system returns to the Service(s) Details screen, which now displays the linked service.
5. Click **Save**.

**Result** The system saves your work and returns to the Case Plan Topics screen.

## Task 20. Approve the amendment

Validate the plan. The system will check that all required fields have been completed. Then, approve the plan.

1. Click **Validate for Approval**. The system displays the following message: “All Case Plan Topics have been provided. The Case Plan is ready to process the approval.”
2. Click **Close** to return to the Case Plan Topics screen.
3. Click **Process for Approval**. The Process Approval screen appears.
4. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Action	Approved - Final	
Reviewers/Approvers	Weaver##, Sam	

5. Click **Save**. You are at the Case Plan Topic screen.
6. Click **Close**.

**Result** The system saves your approval and returns to the Case Plan list screen. You have completed this exercise.

**Note** After you approve an amended case plan, the initial plan will no longer be displayed on the Case Plan list screen. Click the **history** link under the amended plan on the Case Plan list screen to display the Case Plan History screen. Here, you can view the initial plan.

## Exercise CM-9. Record a Safety Assessment

### Scenario

Each new intake requires a separate safety assessment. Perform a safety assessment based on the intake you just recorded: record the assessment in Ohio SACWIS, submit it, and print a JFS 01401 report.

### Tasks

- Task 1. Add a safety assessment
- Task 2. Record safety factors
- Task 3. Record safety considerations
- Task 4. Generate a safety response and submit the assessment for approval
- Task 5. Generate a JFS 01401 Safety Assessment report

### Task 1. Add a safety assessment

Create a safety assessment and identify the participants.

1. In the menu on the left, click the **Safety Assessment** link. The Safety Assessment list screen appears.
2. Click **Add Safety Assessment**. The Safety Assessment Details screen appears.
3. Click **Link Intake**. The Available Intakes screen appears.
4. Select the intake dated 05/10/2005, and click **Save**. The system returns to the Safety Assessment Details screen.
5. Click **Add Child**. The Available Participants screen appears, displaying the members of the Stone family.
6. Select Rockette, Sandy, and Barney, and click **Save**. The system returns to the Safety Assessment Details screen, where the three children are now listed.
7. Click **Add Adult**. The system returns to the Available Participants screen.
8. Select both Fred and Wilma, and click **Save**. The system returns to the Safety Assessment Details screen.
9. Click **Apply**.

**Result** The system saves your work without leaving the Safety Assessment Details screen.

**Task 2. Record safety factors**

Display the **Safety Factors** tab and respond to the questions there.

1. Click the **Safety Factors** tab.
2. In the list of safety factors, click the **edit** link underneath item number 1, A child has received serious, inflicted, physical harm. The Safety Factors Details screen appears.
3. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>Explain</b>	Fred grabbed Rockette and broke her right arm.
<b>Response</b>	Yes

4. Click **OK**.
5. Click the **edit** link for item number 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.
6. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>Explain</b>	The parents are able to protect their children, but they do not believe it's wrong to use severe physical discipline.
<b>Response</b>	Yes

7. Click **OK**.
8. The system requires you to enter explanations for safety factor questions 3 through 15. Using the information below, complete the **Explain** and **Response** fields for each of the remaining items.

<u>#</u>	<u>Explain field</u>	<u>Response field</u>
<b>3</b>	Fred threatened the other two children during the incident when he injured Rockette.	Yes
<b>4</b>	Parents deny violent behavior toward each other.	No
<b>5</b>	Parents admit they have arguments. Both report that no argument has escalated to a physical fight.	No

#	<u>Explain field</u>	<u>Response field</u>
6	Fred's alcohol use often escalates his discipline of Rockette. Fred had been drinking when he broke Rockette's arm.	Yes
7	No mental or physical illness or disability observed for Fred or Wilma.	No
8	Parents meet the children's immediate needs.	No
9	The home was in disarray, with dirty dishes and food throughout. However, the caseworker did not observe any conditions hazardous enough to put the children in immediate danger of serious harm.	No
10	Caseworker observed that Fred acts aggressively towards Rockette and has unrealistic expectations of her.	No
11	There is no evidence the Stones will flee. They were cooperative and allowed the caseworker into their home.	No
12	Fred admitted to the allegation and gave sufficient explanation.	No
13	Parents wanted to take Rockette for medical treatment. Sandy and Barney do not have any immediate physical or mental health needs.	No
14	Rockette and Sandy deny having any sexual contact with anyone. Parents deny any sexual abuse issues with Barney.	No
15	N/A	No

9. Click **Apply**.

**Result** The system saves your work without leaving the **Safety Factors** tab.

**Note** You can save your work and go to other screens without completing every field. However, you will not be able to process the assessment for approval until all the **Explain** and **Response** fields on this screen have been completed.

### Task 3. Record safety considerations

Complete all three sections on the **Safety Considerations** tab.

1. Click the **Safety Considerations** tab.
2. Complete **Section 3: Historical Information** as shown below. Click the **Section 3: Historical Information** link to display this field if it is not already visible.

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>Describe if the caretaker or other person having access...</b>	There was one prior substantiated report of physical abuse of Rockette by Fred.

3. Complete **Section 4: Child Vulnerability** as shown below. Click the link to display this field if it is not already visible.

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>Describe how each child's age, physical, intellectual, and social development...</b>	The children are too young to protect themselves.  Rockette has accepted severe physical discipline as a normal way of life and believes she deserves to be punished for not listening. After the latest incident, she is afraid of Fred.

4. Complete **Section 5: Protective Capacities** as shown below. Click the link to display this field if it is not already visible.

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>What strengths and resources does the family have...</b>	Fred and Wilma are cognitively and emotionally capable of protecting their children. Fred and Wilma's protective capacities are limited. They don't see a problem with using physical discipline and have not attended court-ordered parenting classes.

5. Click **Apply**.

**Result** The system saves your work without leaving the **Safety Considerations** tab.

**Task 4. Generate a safety response and submit the assessment for approval**

Use the **Safety Response** tab to complete the assessment and generate the JFS 01401 report.

1. Click the **Safety Response** tab.
2. In the **Safety Response** field for each child, make the following selection:

<u>Child</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Stone, Barney	Legally authorized out-of-home placement	
Stone, Sandy	Legally authorized out-of-home placement	
Slate, Rockette	Legally authorized out-of-home placement	

3. Click **Generate Safety Response**. The system automatically selects the **Legally Authorized Out-of-Home Placement** check box in the Safety Response area.
4. Click **Validate for Approval**. The system confirms that there are no errors.
5. Click **OK**. The system returns to the **Safety Response** tab.
6. Click **Process for Approval**. The Process Approval screen appears.
7. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
Action	Approved - Final	
Reviewers/Approvers	Weaver##, Sam	

8. Click **Save**. The system returns to the Safety Assessment list screen.

**Result** The system saves your work and returns to the Safety Assessment list screen.

### **Task 5. Generate a JFS 01401 Safety Assessment report**

While you might not be able to generate this report in the training environment, consider the process for generating it.

1. Click the **report** link beside the safety assessment. The Document Details screen appears.
2. Notice that the Document History screen appears. It lists each time an assessment report was generated on this case and saved to the Ohio SACWIS database.
3. Click **Generate Report**. The JFS 01401 - Safety Assessment screen appears.
4. Notice that a parameter screen appears. For this report, you identify the caseworker.
5. Click **Generate Report**.
6. Click **Save**.

**Result** You are returned to the Safety Assessment list screen, and your report has been saved to the Ohio SACWIS database.

## **Exercise CM-10. Record a Dispositional Ruling and Legal Status**

### **Scenario**

The hearing on the motion to modify the court order from Court Ordered Protective Supervision to Temporary Custody has occurred. The agency has been awarded Temporary Custody of Rockette, Sandy, and Barney.

Document the hearing and its outcome.

### **Tasks**

Task 1. Record the hearing

Task 2. Record the ruling and change the children's legal status

**Task 1. Record the hearing**

Use the Hearing Information screen and Hearing Segment Details screen to record basic information about the hearing and its participants.

1. In the menu on the left, click **Court**. The Case Participants screen appears.
2. Click the **Case Legal Actions** link to display the Legal Actions screen.
3. In the **Legal Action** field at the top of the screen, select Motion.
4. Click **Search**. The system displays a list of motions.
5. Click **link legal action** beside the motion dated 05/11/2005. The Create Motion Details screen appears.
6. In the **Legal Action** field, select Record Hearing.
7. Click **Add Action**. The Legal Actions Search Criteria screen appears.
8. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Hearing Type</b>	Dispositional	
<b>Narrative</b>	This hearing is the result of the Motion for Modification, 05/11/2005.	

9. Click **Add Hearing Segment**. The Hearing Segment Details screen appears.

10. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Date of Hearing</b>	05/27/2005	
<b>Time of Hearing</b>	2:30 PM	
<b>Agency Representative</b>	Sam Weaver##	Click the <b>Person Search</b> button and find Sam Weaver. Select his name in the search results.
<b>Available Case Participants</b>	Stone, Fred Stone, Wilma	Click <b>Add&gt;&gt;</b> to move your selection to <b>Case Participants Attending</b> .

11. Click **OK**. The system returns to the Hearing Information screen.
12. Click the **associate participants** link in the Action Participants area. The Associate Participants screen appears.
13. Select Barney, Rockette, and Sandy.
14. Click **OK**.

*Do not click **Save** or **Apply**. Do not leave the Hearing Information screen.*

15. Click the **Court Information** link. The Court Details screen appears.

16. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Court Type</b>	Juvenile	
<b>Court Name</b>	Franklin County Juvenile Court	

17. Click **Save**. The system returns to the Legal Actions Search screen.

**Result** The system returns to the Hearing Information screen. The children's names are now displayed in the Action Participants area.

**Task 2. Record the ruling and change the children's legal status**

Record the ruling separately for each child. This is also the task in which you will terminate COPS and update the children's legal status to Temporary Custody.

1. In the **Legal Actions** field at the top of the screen, select Hearing.
2. Click **Search**. The system displays a list of hearings.
3. Click **Link Legal Action** for the hearing dated 05/27/2005, Dispositional. The Hearing Information screen appears.
4. In the **Legal Action** field, select Ruling.
5. Click **Add Action**. The Ruling Information screen appears.
6. In the **Action Participant** field, select Rockette.
7. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Date of Ruling</b>	05/27/2005	
<b>Hearing Status</b>	Held	
<b>Ruling Type</b>	Dispositional	
<b>Rulings Received</b>	TC	Click <b>Add&gt;&gt;</b> to move your selection to <b>Selected Rulings Received</b> .

8. In the Legal Status Information area, click the **terminate** link for the Temporary Custody Order dated 05/11/2005. The Child Legal Status Details screen appears.

9. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Termination Date</b>	05/27/2005	
<b>Termination Reason</b>	Change in Custody Type	
<b>Custody Episode Terminated</b>	No	

10. Click **OK**. The system returns to the Ruling Information screen.
11. Click **Add Legal Status**. The Child Legal Status Details screen appears again.

12. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Type</b>	Agency	
<b>Legal Status</b>	Temporary Custody	
<b>Effective Date</b>	05/27/2005	

13. Click **OK**. The system returns to the Ruling Information screen.

14. Click **Save**. The system returns to the Legal Actions Search screen.

15. Repeat steps 1 through 14 to record the rulings for Sandy and Barney.

**Result** The system saves your work and returns to the Legal Actions Search screen. You have completed this exercise.

## Exercise CM-11. Record a Case Review and SAR

### Scenario

After 180 days, a case review/SAR for the Stone family is due. Fred and Wilma have not cooperated with the court-ordered case plan and will be charged with contempt of court. Record the case review/SAR.

### Tasks

- Task 1. Add a case review
- Task 2. Record safety review information
- Task 3. Review the parenting practices service
- Task 4. Review the substance use service for Fred
- Task 5. Review the speech therapy service for Sandy
- Task 6. Record information about strengths and needs
- Task 7. Record information for risk reassessment
- Task 8. Record information about the children's current placement
- Task 9. Record permanency information
- Task 10. Record permanency goals
- Task 11. Record your analysis of the case
- Task 12. Record signatures

**Task 1. Add a case review**

Create a case review and link it to the case plan.

1. In the menu on the left, click **Case Review/SAR**. The Case Review/SAR list screen appears.
2. Click **Add Case Review/SAR**. The Identifying Information screen appears.
3. In the **Case Review Type** field, select Semiannual Administrative Review.
4. Click the link **Select Available Case Plan(s)**. The Available Case Plans to be Reviewed screen appears. The amended case plan is checked (selected).
5. Click **OK**.
6. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Sunset Activity</b>	Original Court Complaint Date	
<b>Sunset Date</b>	02/01/2005	

7. Click **Save**.

**Result** The system saves your work and displays the Case Review Topics screen.

**Task 2. Record safety review information**

Use the Safety Review Information screen to describe any threat to the children.

1. Click the **Safety Review** link. The Safety Review Information screen appears.
2. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Select and Complete the Appropriate Case Circumstance</b>	A safety threat is active now	
<b>1. Describe the active safety threat(s), identify which children are affected...</b>	Fred continued to use severe physical discipline and broke Rockette's arm. Although Sandy and Barney were not injured, they are at risk because Fred does use physical discipline on all the children. The children were removed to eliminate access. The parents have not completed case plan services.	
<b>2. Describe the present protective capacities of each caregiver...</b>	Wilma does not protect the children or try to keep Fred from using physical discipline on the children. Fred has continued to use severe physical discipline and it has escalated to the point of breaking Rockette's arm. He still does not see any problem with using this type of discipline.	
<b>3. Describe the present vulnerability of each child and highlight...</b>	A case aide has been working with the children in the Stone family regarding self-protection skills. They are still vulnerable due to their age.	
<b>Safety Response Review</b>	Modify	

3. Click **Save**.

**Result** The system saves your work and returns to the Case Review Topics screen.

**Task 3. Review the parenting practices service**

Record the service(s) provided for Fred and Wilma and assess their progress.

1. Click the **Service Review** link. The Service Review Information screen appears.
2. Click the **edit progress** link for the combined concern for Fred and Wilma. The Services Details screen appears.
3. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Discuss the impact toward addressing safety...</b>	The Stone children are currently residing in a licensed foster home and are no longer at risk of physical abuse. The agency is working with Fred and Wilma to reunify the children. The barriers to reunification are the parents' denial that excessive physical discipline is abuse and their refusal to complete parenting classes.	
<b>Progress Addressing Concern</b>	Insufficient Progress	

4. Click **Save**. The system saves your work and returns to the Service Review Information screen.
5. Click the **services** link. The Service Review Details screen appears.
6. Click the check boxes in the far-right column. All services for this concern will be addressed in a single review on the screen.
7. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Review Date</b>	07/29/2005	
<b>Service Recommendation</b>	Continue	
<b>Additional Comments</b>	There has not been progress in reducing risk to the children.	
<b>Do Barriers Exist?</b>	Yes	
<b>Barrier Type</b>	Client Refusal	
<b>If Yes, Explain</b>	Fred and Wilma do not recognize a problem with their disciplining style and do not see the need to attend parenting classes.	

8. Click **Save**.

**Result** The system saves your work and returns to the Service Review Information screen.

**Task 4. Review the substance use service for Fred**

Record the alcohol abuse counseling provided for Fred and assess his progress.

1. Click the **edit progress** link for Fred’s individual concern. The Services Details screen appears.
2. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Discuss the impact toward addressing safety...</b>	Fred has scheduled a drug/alcohol assessment two different times but has failed to keep both appointments. The agency is going to file contempt of court charges against Fred for not following the case plan.	
<b>Progress Addressing Concern</b>	Insufficient Progress	

3. Click **Save**. The system saves your work and returns to the Service Review Information screen.
4. Click the **services** link. The Service Review Details screen appears.
5. Click the check boxes in the far-right column. All services for this concern will be addressed in a single review on the screen.
6. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Review Date</b>	07/29/2005	
<b>Service Recommendation</b>	Continue	
<b>Do Barriers Exist?</b>	Yes	
<b>Barrier Type</b>	Client Refusal	
<b>If Yes, Explain</b>	Fred has refused to obtain a drug and alcohol assessment.	

7. Click **Save**.

**Result** The system saves your work and returns to the Service Review Information screen.

**Task 5. Review the speech therapy service for Sandy**

Sandy has been receiving speech therapy to correct her speech problem. Review her progress.

1. Click the **edit progress** link for the Physical/Cognitive/Social Development concern for Sandy. The Services Details screen appears.
2. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Discuss the impact toward addressing safety...</b>	Sandy has been attending speech therapy to correct her speech problem.	
<b>Progress Addressing Concern</b>	Some Progress	

3. Click **Save**. The system saves your work and returns to the Service Review Information screen.
4. Click the **services** link. The Service Review Details screen appears.
5. Click the check boxes in the far-right column. All services for this concern will be addressed in a single review on the screen.
6. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Review Date</b>	07/29/2005	
<b>Service Recommendation</b>	Continue	
<b>Do Barriers Exist?</b>	No	

7. Click **Save**. The system saves your work and returns to the Service Review Information screen.
8. Review the combined service for all three children, by completing steps 1 through 7 using your own information.
9. Click **Close**.

**Result** The system returns to the Case Review Topics screen.

**Task 6. Record information about strengths and needs**

Assess the functioning of the parents and children.

1. Click the **Strength and Needs Update** link. The Strength and Needs Update Information screen appears.

2. Complete the fields on child functioning:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Self Protection</b>	Yes	
<b>Physical/Cognitive/Social Development</b>	No	
<b>Emotional Functioning</b>	No	

3. Complete the fields on family functioning:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Family Roles, Interactions, and Relationships</b>	Yes	
<b>Resource Management and Household Maintenance</b>	No	
<b>Extended Family, Social and Community Connectedness</b>	Yes	

4. Complete the fields on adult functioning:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Cognitive Abilities</b>	Yes	
<b>Physical Health</b>	No	
<b>Emotional/Mental Health Functioning</b>	No	
<b>Domestic Relations (Domestic Violence)</b>	No	
<b>Substance Abuse</b>	Yes	
<b>Response to Stressors</b>	Yes	
<b>Parenting Practices</b>	Yes	

5. Complete the fields on historical functioning:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Caretaker's Victimization of Other Children</b>	No	
<b>Caretaker's Abuse/Neglect as a Child</b>	Yes	
<b>Impact of Past Services</b>	No	

6. Provide additional information about the family and their situation:

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>Describe how the family and other individuals involved in the case view their own strengths and problem areas.</b>	Fred and Wilma do not recognize a problem with their disciplining style and do not see the need to attend parenting classes. They believe they provide a loving and safe environment for their children.
<b>Consider the elements and the impact of provided services as discussed in the service review</b>	His substance use and cognitive abilities continues to be an issue because Fred has refused services.
<b>Describe the most significant new information...</b>	Fred and Wilma have put the children at risk due to their continued use of severe physical discipline.
<b>Summarize the key case activities...</b>	Caseworker had increased contacts and visits with the parents and the children to ensure the safety of the children while they were in their biological home. Since the children were removed from the home, the caseworker visits them weekly. Office conferences are held with the parents every two weeks.
<b>Describe the quality of visitation...</b>	Fred and Wilma visit the children weekly in a supervised environment. Interaction between Rockette and her parents is distant. Rockette does not communicate with her parents and there is no physical contact. Sandy, Barney, Fred, and Wilma play games and interact in an appropriate manner.

7. In the **Strength/Needs Status** field, select Completed.

8. Click **Save**.

**Result** The system saves your work and returns to the Case Review Topics screen.

**Note** Use the **Tab** key to move from field to field. When a field is highlighted, you can select Yes by pressing **Y** on your keyboard or No by pressing **N**.

**Task 7. Record information for risk reassessment**

On the Risk Reassessment screen, complete the risk reassessment checklist and calculate the score. You will have the option to enter a policy override at the end of this task.

1. Click **Risk Reassessment**. The Risk Reassessment Information screen appears.
2. In the field **Is this a non-child abuse and neglect case or child(ren) are in PC?**, select No.
3. Complete the risk reassessment checklist as shown:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>R1. Number of Prior Reports</b>	B	One or Two
<b>R2. Number of Children in the Home</b>	B	Three or More
<b>R3. Number of Adults in the Home</b>	A	Two or More
<b>R4. Current Age of Primary Caregiver</b>	B	27 or younger
<b>R5. Either Caregiver Currently has Major Parenting Skills Problem</b>	B	Yes
<b>R6. Either Caregiver is Currently Involved in Harmful Relationship</b>	A	No
<b>R7. Either Caregiver has a Current Substance Abuse Problem</b>	A	No
<b>R8. New Complaints of Abuse/Neglect Since Last Assessment</b>	A	No, or complaint was unsubstantiated and screened out.
<b>R9. Primary Caregiver(s) Progress Towards Case Plan Goals Since Last Assessment</b>	C	Minimal participation or refuses involvement; rarely or never demonstrates desired behavior.
<b>R10. Secondary Caregiver(s) Progress Towards Case Plan Goals Since Last Assessment</b>	D	Minimal participation or refuses involvement; rarely or never demonstrates desired behavior.

4. Click **Calculate Scores**. The Policy Override Information screen appears. Key fields are already prepopulated.
5. Click **Save**.

**Result** The system saves your work and returns to the Case Review Topics screen.

**Note** The score is displayed on the Policy Override Information screen. If you change an answer, you must click **Calculate Scores** again to update the score.

## Task 8. Record information about the children's current placement

Record your assessment of the placement and whether it should be continued.

1. Click the link **Custody/PSUP/In-Home Supportive Services**. The Custody/PSUP/In-Home Supportive Services Information screen appears.
2. Click the **edit** link for Rockette. The Safety and Appropriateness of Current Placement Details screen appears.
3. Complete the following fields:

<b>Field Name</b>	<b>Information to Enter/Select</b>
<b>Describe how current placement...</b>	The current placement is safe because it meets all the site and safety licensing requirements of ODJFS. They are also willing to work with the biological parents to help the reunification process.
<b>The out-of-home placement...</b>	Placement must continue until services on the Case Plan can be implemented and risk reduced.
<b>Was the review conducted?</b>	N/A

4. Click **Save**. The system saves your work and returns to the Custody/PSUP/In-Home Supportive Services Information screen.
5. Repeat steps 2 through 4 for Sandy and Barney, and enter the same information for them as you did for Rockette.
6. Click **Close**.

**Result** The system returns to the Case Review Topics screen.

**Note** The number of placement and legal status changes during the review period will be displayed in the Placement/Legal Status Information area of the screen.

### Task 9. Record permanency information

Record the agency's recommendation for custody of the children and supporting information.

1. Click the **Permanency Information** link. The Permanency Information screen appears.
2. For each topic in the table, click **edit** and enter the information given below. Click **Save** after each entry to return to the topic list.

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>Describe the agency's recommendation regarding the child's custody...</b>	The agency recommends that Rockette, Sandy and Barney remain in the custody of the agency until risk is reduced and they can be safely reunified with their family.
<b>Explain the agency's recommendation regarding the termination...</b>	Select the <b>Not Applicable</b> check box.
<b>Is a supplemental plan for the family needed at this time?</b>	No The agency has decided not to develop a supplemental plan at this time.
<b>Describe the agency's progress toward implementing an existing supplemental plan...</b>	Select the <b>Not Applicable</b> check box.
<b>Explain the agency's progress in meeting the needs of the child...</b>	Not Applicable.
<b>Describe the agency's recommendation regarding (1) maintaining the child...</b>	Not Applicable.
<b>Describe the agency's effort to locate an adoptive placement...</b>	Not Applicable.
<b>Provide any additional comments or recommendations...</b>	Not Applicable.

3. On the Permanency Information screen, click **Close**.

**Result** The system returns to the Case Review Topics screen.

**Note** The PPLA and Permanent Custody fields are activated based on the legal status type of Permanent Custody or Planned Permanent Living Arrangement.

### Task 10. Record permanency goals

Record the status of the permanency goals for each child.

1. Click the **Permanency Goals** link.
2. Click the **edit** link for Rockette. The Narrative Details screen appears.
3. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>
Does the child's current permanency goal need amendment?	No
If No, what is the estimated date . . . .	01/25/2006

4. Click **OK**. The system returns to the Permanency Information screen.
5. Repeat steps 2 through 4 for Sandy and Barney. Use the same information for them as you did for Rockette.
6. On the Permanency Information screen, complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>
Was JFS 01443 Child's Education and Health Information Form updated...	Yes
A copy of the JFS 01443 was provided to the parent(s) and substitute caregiver.	Select this check box.

7. Click **Save**.

**Result** The system saves your work and returns to the Case Review Topics screen.

### Task 11. Record your analysis of the case

Use the Case Analysis screen to enter information about the current status of agency involvement.

1. Click the **Case Analysis** link.
2. Complete the following fields:

<b><u>Field Name</u></b>	<b><u>Information to Enter/Select</u></b>
<b>Agency involvement</b>	Continue Agency Involvement – Family in need of Agency Services
<b>Out-of-Home Placement</b>	Select this check box.
<b>Describe the reasons for the case status selected above....</b>	Out-of-home placement services will be provided for Rockette and Sandy until they can be reunified.
<b>Case Review Completed</b>	07/29/2005
<b>SAR Held with Family Date</b>	07/29/2005
<b>Will the case plan be amended as a result of this review?</b>	No
<b>Do you need to complete a reunification assessment?</b>	No

3. Click **Save**.

**Result** The system saves your work and returns to the Case Review Topics screen.

## Task 12. Record signatures

Five people attended the SAR: the parents, Fred and Wilma; the Guardian ad litem, Brian Hunt; and the foster parents, Esteban and Elena Lopez. As the final step, record their signatures on the Signature/Notice Information screen.

1. Click **Signature/Notice Information**. The Signature/Notice Information screen appears.
2. Click **Add Signature/Notice**. The Signature/Notice Details screen appears.
3. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>SAR Participant</b>	Fred Stone	
<b>Relationship to Child</b>	Parent	
<b>Signature Captured?</b>	Yes	
<b>Required participant was notified by US mail.</b>	Select this check box.	

4. Click **Save**. The system saves your work and returns to the Signature/Notice Information screen.
5. Click **Add Signature/Notice**. The Signature/Notice Details screen appears.
6. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>SAR Participant</b>	Wilma Stone	
<b>Relationship to Child</b>	Parent	
<b>Signature Captured?</b>	Yes	
<b>Required participant was notified by US mail.</b>	Select this check box.	

7. Click **Save**. The system saves your work and returns to the Signature/Notice Information screen.
8. Repeat steps 5 through 7 for the remaining three signatories. Use the information below:

<u>Field Name</u>	<u>Brian Hunt</u>	<u>Elena Lopez</u>	<u>Esteban Lopez</u>
<b>SAR Participants</b>	Non-Case	Non-Case	Non-Case
<b>Non Case Member</b>	Brian Hunt##	Elena Lopez##	Esteban Lopez##
<b>Relationship to Child</b>	GAL	Non-relative	Non-relative
<b>Signature Captured?</b>	Yes	Yes	Yes
<b>Required participant was notified by US mail.</b>	Select this check box.	Select this check box.	Select this check box.

9. Click **Close**. The system returns to the Case Review Topics screen.

10. Click the **Case Analysis** link.

11. Click **Validate for Approval**.

12. Click **Close**. The system returns to the Case Analysis screen.

13. Click **Save**.

14. Click **Close**.

**Result** The system returns to the Case Review/SAR list screen. You have completed this exercise.

## Exercise CM-12. Record a Reunification Assessment

### Scenario

Time passes, and on 10/28/2005 another case review is completed. Fred and Wilma have successfully completed parenting classes and all family members, with the exception of Rockette, have been attending family counseling.

Rockette's behavior has become increasingly aggressive, and the therapist has recommended that she not attend family counseling. During visits, Rockette either refuses to interact with Fred and Wilma or is completely volatile.

Fred and Wilma would like to be reunited with the two younger children, but they say they cannot handle Rockette's behavior and do not want her to be reunified with the family. They do not want her to influence the other children negatively.

You will complete a reunification assessment for all family members and submit your recommendation for approval.

### Tasks

- Task 1. Create the assessment and identify the participants
- Task 2. Address issues affecting the children's safety
- Task 3. Describe participant readiness for reunification
- Task 4. Make a recommendation and approve it

### **Task 1. Create the assessment and identify the participants**

Add a reunification assessment and identify Rockette, Sandy, Barney, Fred, and Wilma as the participants.

1. In the menu on the left, click **Reunification Assessment**. The Reunification Assessment(s) screen appears.
2. Click **Add Reunification Assessment**. The Identifying Information screen appears.
3. Click **Add Child Consideration**. The Available Reunification Participants screen appears.
4. Select Barney, Sandy, and Rockette.
5. Click **OK**. The system returns to the Identifying Information screen.
6. Click **Add Adult Consideration**. The Available Reunification Participants screen appears.
7. Select Fred and Wilma.
8. Click **OK**.
9. Click **Apply**.

**Result** The system saves your work without leaving the Identifying Information screen.

**Task 2. Address issues affecting the children's safety**

Identify the original safety issues and document how they have been addressed.

1. Click the **Past & Present Safety** tab.
2. Complete the following field as shown:

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>What were the original safety issues that resulted in child placement?</b>	Law enforcement removed all three children from their home because Fred broke Rockette's arm and threatened Barney and Sandy.

3. Click the **edit** link for the first question.

**Have the original safety issues been altered or reduced to a sufficient level whereby control with the family is probable?**

The Narrative Details screen appears.

4. Complete the following fields:

<u>Field Name</u>	<u>Reunification Participant Response</u>	<u>Narrative</u>
<b>Stone, Barney</b>	Yes	Fred and Wilma completed parenting classes and are using nonphysical means of discipline during visits with Barney and Sandy. They have been attending family counseling with the two children and their visits have been regular and beneficial.
<b>Stone, Sandy</b>	Yes	
<b>Slate, Rockette</b>	No	Fred and Wilma do not want Rockette to be reunified with the family. They blame her for the removal of the other two children.

5. Click **OK**. The system returns to the **Past & Present Safety** tab.
6. Click the **edit** link for the next question:

**Were there other safety issues identified after the child(ren) came into placement that necessitated or contributed to the continuation of placement?**

The Narrative Details screen appears.

7. Complete the following fields:

<u>Field Name</u>	<u>Reunification Participant Response</u>	<u>Narrative</u>
<b>Stone, Barney</b>	Yes	Fred and Wilma continued to deny that physical discipline was inappropriate and they were noncompliant with parenting classes.
<b>Stone, Sandy</b>	Yes	
<b>Slate, Rockette</b>	Yes	They blamed Rockette's behavior as a reason to use physical discipline.

8. Click **OK**. The system returns to the **Past & Present Safety** tab.

9. Click the **edit** link for the next question:

**Have the safety issues identified in the previous field been resolved sufficiently whereby control within the family is probable?**

The Narrative Details screen appears.

10. Complete the following fields:

<u>Field Name</u>	<u>Reunification Participant Response</u>	<u>Narrative</u>
Stone, Barney	Yes	Parents are making a good-faith effort to refrain from using physical discipline. Fred and Wilma have learned non-physical means of discipline and are using them during visits. Their interaction with the two younger children, as well as the overall relationship, has improved significantly. They are cooperative with the caseworker and are continuing case plan services.
Stone, Sandy	Yes	
Slate, Rockette	No	Their relationship to Rockette continues to deteriorate. Her therapist has recommended that visitation is stopped, as it's not in Rockette's best interest to continue.

11. Click **OK**. The system returns to the **Past & Present Safety** tab.

12. Click the **edit** link for the next question:

**Are parent/guardian/custodian(s) in compliance with court orders?**

The Narrative Details screen appears.

13. Complete the following fields:

<u>Field Name</u>	<u>Reunification Participant Response</u>	<u>Narrative</u>
Stone, Fred	Yes	Fred and Wilma have successfully completed parenting classes and are currently attending family counseling with Sandy and Barney. Fred has obtained a drug/alcohol assessment and is following the recommendations of the assessment.
Stone, Wilma	Yes	

11. Click **OK**. The system returns to the **Past & Present Safety** tab.

15. Click **Apply**.

**Result** The system saves your work without leaving the **Past & Present Safety** tab.

**Task 3. Describe participant readiness for reunification**

Provide the justification for reunifying Sandy and Barney with their parents and the reason Rockette will not be reunified.

1. Click the **Readiness** tab.
2. Click the **edit** link for the first question:

**Does the child demonstrate an acceptance of the reunification plan?**

The Narrative Details screen appears.

3. Complete the following fields:

<u>Field Name</u>	<u>Reunification Participant Response</u>	<u>Narrative</u>
Stone, Barney	Yes	Sandy and Barney are very attached to Fred and Wilma. They are very excited to see them at visits. Although they are not old enough to verbalize the wish to be reunified with their parents, they go to them willingly.
Stone, Sandy	Yes	
Slate, Rockette	No	Rockette's relationship with her mother and step-father is very strained. She verbalizes that she does not want to go home.

4. Click **OK**. The system returns to the **Readiness** tab.
5. Click the **edit** link for the question:

**Are there any issues or concerns related to other children or adults in the family which may impact the child(ren)'s return?**

The Narrative Details screen appears.

6. Complete the following fields:

<u>Field Name</u>	<u>Reunification Participant Response</u>	<u>Narrative</u>
Stone, Barney	No	Sandy and Barney have a half-sister, Rockette, who will not be reunified. Fred and Wilma do not want her to be reunified due to her behavioral problems.
Stone, Sandy	No	
Slate, Rockette	No	Sandy and Barney are attached to Rockette and will continue counseling to address any issues regarding Rockette not being reunified with the family.

7. Click **OK**. The system returns to the **Readiness** tab.

8. Click the **edit** link for the question:

**Does the parent/guardian/custodian demonstrate an acceptance of the reunification plan?**

The Narrative Details screen appears.

9. Complete the following fields:

<u>Field Name</u>	<u>Reunification Participant Response</u>	<u>Narrative</u>
Stone, Fred	Yes	Fred and Wilma are very excited about Sandy and Barney coming home. They have participated in case plan services and have made major changes in their discipline methods. Fred and Wilma both see and admit the negative impact the physical discipline had on their children.
Stone, Wilma	Yes	

10. Click **OK**. The system returns to the **Readiness** tab.

11. Click the **edit** link for the question:

**Does the parent/guardian/custodian have the capacity to provide for the child(ren)'s basic needs (for example, food, clothing, shelter, medical care)?**

The Narrative Details screen appears.

12. Complete the following fields:

<u>Field Name</u>	<u>Reunification Participant Response</u>	<u>Narrative</u>
Stone, Fred	Yes	Fred and Wilma are able to provide for the children's basic needs.
Stone, Wilma	Yes	

13. Click **OK**. The system returns to the **Readiness** tab.

14. Click the **edit** link for the question:

**During visits, has the parent/guardian/custodian demonstrated an ability to meet the child's needs for safety in a manner that suggests safety threats are not expected to emerge by the child(ren)'s presences within the family?**

The Narrative Details screen appears.

15. Complete the following fields:

<u>Field Name</u>	<u>Reunification Participant Response</u>	<u>Narrative</u>
Stone, Fred	Yes	Fred and Wilma have learned new parenting techniques and have been applying them during visits. They currently use non-physical types of discipline.
Stone, Wilma	Yes	

16. Click **OK**. The system returns to the **Readiness** tab.

17. Click the **edit** link for the question:

**Are the parent/guardian/custodian and/or other household members willing and able to use their protective capacities, resources and strengths to provide sufficient support to the child(ren)?**

The Narrative Details screen appears.

18. Complete the following fields:

<u>Field Name</u>	<u>Reunification Participant Response</u>	<u>Narrative</u>
Stone, Fred	Yes	Fred and Wilma have scheduled appointments for family counseling for the next two months. They have found a parent support group and plan on joining. By utilizing these services and the continued agency services they will be able to support Sandy and Barney.
Stone, Wilma	Yes	

19. Click **OK**. The system returns to the **Readiness** tab.

20. Click **Apply**.

**Result** The system saves your work without leaving the **Readiness** tab.

**Task 4. Make a recommendation and approve it**

Summarize the change in family dynamics, record the decision about reunification, and address any necessary interventions that need to be in place.

1. Click the **Decision** tab.
2. Complete the following field as shown:

<u>Field Name</u>	<u>Information to Enter/Select</u>
<b>Describe how the family dynamics may change when the child(ren) returns</b>	Having Sandy and Barney back in the home full time will require a significant adjustment by Fred and Wilma. They need to continue to use the new parenting techniques they have learned. Their stress level will increase, and Fred will need to handle it without the use of alcohol for the first time. Fred and Wilma will need to work with the case aide to address issues as they come up.

3. In the Narrative Information section, click the **edit** link for the first question, **Is reunification recommended?** The Narrative Details screen appears.

4. Complete the following fields:

<u>Field Name</u>	<u>Reunification Participant Response</u>	<u>Narrative</u>
<b>Stone, Barney</b>	Yes	Risk has been reduced significantly and the parents and children want to be reunified with the exception of Rockette. Fred and Wilma clearly understand the effects of physical discipline and are very willing to utilize services to help support them. The children are still vulnerable due to their age. The agency will continue court ordered involvement to ensure the reunification is successful.
<b>Stone, Sandy</b>	Yes	
<b>Slate, Rockette</b>	No	

5. Click **OK**. The system returns to the **Decision** tab.
6. Click the **edit** link for the question, **Are interventions needed to support the child's reunification?** The Narrative Details screen appears.

7. Complete the following fields:

<u>Field Name</u>	<u>Reunification Participant Response</u>	<u>Narrative</u>
<b>Stone, Barney</b>	Yes	Yes A case aide has been assigned to the Stone family to support them during the adjustment of reunification. She will visit the home three times per week to provide guidance. Caseworker will also increase home visits to monitor progress.
<b>Stone, Sandy</b>	Yes	
<b>Slate, Rockette</b>	N/A	(system populated)

8. Click **OK**. The system returns to the **Decision** tab.
9. Click **Process Approval**. The Process Approval screen appears.
10. Complete the following fields:

<u>Field Name</u>	<u>Information to Enter/Select</u>	<u>Notes</u>
<b>Action</b>	Approved – Final	
<b>Reviewers/Approvers</b>	Weaver##, Sam	

11. Click **Save**.

**Result** The system saves your approval and returns to the Reunification Assessment(s) screen. You have completed this exercise.

**You have completed the Case Management Exercises.**