CASE SERVICES OVERVIEW QUESTION AND ANSWER DOCUMENT
JULY 22, 2011

1. Does the case closure automatically close case services, or do you have to do it individually?

   For paid case services, prior to closing the case worker will need to end date the services. For non-paid services, upon approval of the case closure, the system will automatically end date the services.

2. If you do a service review outside of the case review, will the SAR pull it in?

   Service Reviews completed outside of the Case Review will pull into the Case Review.

3. Can the service begin date be a future date?

   No, Case Services cannot have a future date.

4. For reporting purposes would updating the case services to referred, scheduled or provided at 90 day CRs and SARs be ok. Or do they need to be updated more timely?

   To the extent possible, the case record should accurately reflect the current status of all case activities and services on a daily basis. The record should be updated in a timely manner, however, it is required that the record be updated at the 90 day review.

5. If a child is in custody of the agency and we are providing services, gas cards, to the parent, we need to use 'Case Member' case service since only the children in display in the drop down of a 'Caregiver' case service, correct?

   Provision of services for children in an out of home placement is not specific to just the child/caregiver. Services can be provided to any case member.

6. Which parts of the service activity are optional?

   Participation Status is the only required field within the Service Activity Record. All other fields are optional.

7. What is the difference between 'status begin date' and 'effective date'? Where is the effective date entered?

   The effective date of the case service spans all status records. The status date is the date of the specific status record for a case service member began.

8. Are all services 'end dated' at some point or is this optional?

   For paid case services, prior to closing the case the caseworker will need to end date the services. For non-paid services, upon approval of the case closure, the system will automatically end date the services. When a Case Service is no longer Needed, Referred, Scheduled or Provided, the Case Service should be end dated.

9. Did you say that "expected participation frequency' was optional to put in?

   Participation Frequency is optional.

10. Will all of this information transfer to generated documents (i.e. Case Rev., SAR, and Case Plans) specifically will the calendar of attendance be included in the generated report?

    At this time, no Service Activity information is pulled into any documents (i.e. Case Review, SAR, or Case Plan). In addition, no report exists for the Service Activity.

11. Would a caseworker be expected to complete an activity log in addition to completing a case service review for updates? Isn't this a duplicated effort?

    An activity log is not required when completing a case service review for updates.

12. Provide an example of when a case service review would be completed beyond case reviews and SAR's.

    Rule requires a service review at the 90 and 180 day review; however, to accurately and timely reflect any changes to a service, a service review can be performed outside of a case review. A case review is required at the time of case closure unless the closure is within 30 days of the prior case review and the intent to close is documented in the prior case review.

13. Is changing the status of case services (i.e. referred, scheduled, planned etc) mandated?

    No, however, to the extent possible, the case record should accurately reflect the current status of all case activities and services on a daily basis.

14. Will an amendment be required every time a change in the status of the service?

    No case plan amendment is required when changing a status in a case service.

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15. Define paid services? Medicaid or agency paying for the service?

    Paid Service is any service that an Agency pays for directly.

16. There is an issue when a client began a service prior to development of the case services in SACWIS. The system doesn't allow you to put in this date if it was prior to effective date of the case service.

    A Case Service Effective Date can be the same date as the case open date.

17. We had an issue with using the apply to members function when family members had separate goals during the case review, could you walk through this process.

    Please refer to the Managing Case Services knowledge base article.

18. Will we need to "amend" the case plan each time we update services?

    No case plan amendment is required when updating a case service (see responses to questions 23, 24 and 32).

19. When do you do a service review?

    Rule requires a service review at the 90 and 180 day review; however, to accurately and timely reflect any changes to a service, a service review can be performed outside of a case review. A case review is required at the time of case closure unless the closure is within 30 days of the prior case review and the intent to close is documented in the prior case review.

20. How do you determine the effective date?

    The effective date is the date the case service started.

21. If we refer for services at intake but close the case, do we enter this info but then close the case without end dating the services?

    The record should accurately reflect any case services that were referred. For paid case services, prior to closing the case worker will need to end date the services. For non-paid services, upon approval of the case closure, the system will automatically end date the services.

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22. In regards to the "authorize" services: Is this going to prevent fiscal from paying, and possibly receiving reimbursement if this is not done? Are authorizations going to be performed by specific roles or are any workers going to be "authorizing" services as they see fit? Is there a way to change categories after they are locked, "scheduled" to "provided" or is every worker at different points in the case, from planning to ongoing, have to create new services for the technically the same service?

    The "authorize" link for a paid case service has not changed. It is done exactly as it was before the new case services functionality was added. There has always been a user group of Service Authorization Worker and Service Authorization Supervisor, and staff assigned to those User Groups will be able to authorize paid services.

23. What prints out on the case plan in regards to status and frequency? If you are changing something it will cause case plans to need amending and re-filed with the court. A case plan is a court order once it is filed, and having a case plan that is different than the filed case plan will create issues.

    Nothing in the case services functionality prints on the Case Plan in regards to status and frequency, however, if you have status and frequency information in the case plan narratives, you will need to amend your case plan to accurately reflect changes made.

24. The case plan is the contract that the family has to follow. Wouldn't changes in status/frequency be more related to case review?

    Yes, however, if status and frequency information is documented in the narratives in the case plan, the case plan would need to be amended.

25. Is any of the new service activity information pulled into the Case Review/SAR or into Activity Logs?

    No Service Activity Information is pulled into the Case Review/SAR or the Activity Log.

26. Regarding service providers and reporting.....are we able to track/run a report for a specific service provider to show the level of service provision for that provider across all clients being served? i.e.: time it took from the date of referral to the date of the first session date; or number of clients being served by that provider; or the length of time it took to complete that service with that provider.....reason for the question and wanting a type of 'provider service summary' is to assist managers when entering into contracts with service providers, or managers seeking better service provision, this kind of information would give the manager 'numbers/hard data' to use when negotiating.

    Currently no report exists in SACWIS to track this information. We plan to create Case Service Reports in the future.

27. Under "referred" service status- can we only link one provider or can multiple providers be linked?

    Multiple referred status records with multiple providers for a case service member can exist for a case service.

28. What is the security role that governs the service auth link? If the user does not have the service authorization security role, will that link not be there?

    A user must have the following User Group to approve a service authorization, Service Authorization Worker and Service Authorization Supervisor. Users that do not have these will be able to see the authorize link, however, they will not be able to approve a service authorization.

29. Service Review area is not generated automatically under the Case Review/SAR links, correct?

    The service review is generated automatically, however, only case services linked to the case plan being reviewed will be available.

30. Will updating this under case services link to the appropriate Case Review/SAR?

    Yes, any case service linked to the case plan being reviewed will be linked to the appropriate Case Review/SAR.

31. Did you say Service Activity needs to be update at least every 90 days?

    The Participation Status must be updated at least every 90 days.

32. Every time a counselor changes frequency, it needs to be updated? Would this also mean the Case plan would need amended?

    Nothing in the case services functionality prints on the Case Plan in regards to frequency, however, if you have frequency information in the case plan narratives, you will need to amend your case plan to accurately reflect changes made.

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