## How do I…Ongoing Case Work

| How Do I…? | Selections | Tips & Guidelines |
|---|---|---|
| Create a Service | ▪ Add a service:<br>  ▪ From the Desktop, select *Create* > *Case Work*.<br>  ▪ From the Placement dropdown select Service, select the case and then select the case participant.<br>  ▪ Click **Create**.<br>  ▪ From the Service page, enter the begin date and time.<br>  ▪ Select the Service type from the dropdown.<br>▪ Add the provider:<br>  ▪ Click the Provider tab.<br>  ▪ Click the Search hyperlink, and then enter the name of the provider which will be providing the service and click Search.<br>  ▪ If the provider is not already created, you will receive a Validation Error indicating that no matches were found. No matching providers will appear under the Providers Returned field.<br>  ▪ Close the Validation Error box.<br>  • If you do not find the provider you want to link to the service, you must create the provider.  See the Provider How Do I…Guide.<br>  • If the provider is already created, the provider name will display in the Provider's Returned field.<br>  • Select the radio button that corresponds with the correct Provider, and click **Continue**.<br>▪ Submit the approval request for the service:<br>  ▪ Click the Service tab.<br>  ▪ Select *Approvals* from the Options dropdown and then click Go.<br>  ▪ From the Approvals History page, select the *Approve* radio button, and then click **Continue**.<br>▪ To document Service Information:<br>  ▪ Select *Text* from the Options dropdown, and then click Go.<br>  ▪ This will display a blank Word document. Enter the service narrative description.<br>  ▪ Click **Save**<br>Click and return to the desktop. | *The Service page is used to document the provision of those services that do not alter the living arrangement of the recipient of the service.  A Service can include a trial home visit, a run-away incident, or other special circumstance for which a removal episode will not end.*<br><br>*Since it is sometimes possible for a case participant to be receiving services from more than one provider, the Service page will allow concurrent open episodes or services.*<br><br>*If Service has already been created, select the appropriate Desktop Case icon on the Cases Outliner, click the* Placement/Services *Icon, and then select the appropriate Service record's hyperlink to view the service.*<br><br>*This is not working in UAT as of 3/2. ActiveX problem (contact System Administrator).* |
| End a Service | ▪ From the desktop, click the Cases expando.<br>▪ Select the Case icon for the Case you wish to access.<br>▪ Select the Placement/Services Icon.<br>▪ Click the hyperlink for the Service you wish to end.<br>▪ From Options dropdown field, select *Service Ending*, and then click **Go**. Service Ending page displays.<br>▪ From the Service Ending page, complete the Ending Date and Time and the Ending Reason fields.<br>▪ Click **Save**, and then click **Close**. | *If a service has been documented and approved through the Service page, this page is used to end the service.* |

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| Create a Living Arrangement | ▪ From the Desktop menu, select Create > Case Work. The Create Case Work page displays.<br>▪ From the Placement dropdown list, select Living Arrangement, and then select the appropriate family Case and the appropriate participant for whom you want to create a Living Arrangement.<br>▪ Click **Create**, and then the Living Arrangement page displays. Enter appropriate field information highlighted in blue, and then click **Save**.<br>    ▪ When the user attempts to create a Living Arrangement from the Create Casework window, if the child is currently placed in an Out of Home Placement or has a open Living Arrangement with a Begin Date and Time but no End Date and Time, an edit message is displayed stating, "This child is currently placed in an Out of Home Placement or has a documented Living Arrangement. Would you like to continue to create a Historical Living Arrangement?  Select Yes to continue or No to cancel."<br>▪ Click **Close**. | *The Living Arrangement page is used to document information pertaining to the living arrangement for a child when the child has not been removed from the home.*<br><br>*A single child (participant) can have only one out of home placement or living arrangement at a time and the Out of Home Placement or Living Arrangement dates cannot overlap one another.*<br><br>*If an Out-of Home placement is made for a child, and the child is to be placed at another facility/foster home, or in another living arrangement, the original placement must be ended prior to the second placement or living arrangement being initiated.*<br><br>*Gaps in a child's living arrangement can be filled using the Living Arrangement page but remember that the beginning and ending dates and times cannot overlap with an existing Placement or Living Arrangement.* |
| End a Living Arrangement | ▪ From the desktop, click the Cases expando.<br>▪ Select the Case icon for the Case you wish to access.<br>▪ Select the Placement/Services Icon.<br>▪ Click the hyperlink for the Living Arrangement you wish to end.<br>▪ From the Living Arrangement page, complete the Ending Date and Time fields.<br>▪ Click **Save**, and then click **Close**. | |

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## Out of Home Placement

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<tr><td>Create an Out of Home Placement</td><td>
<ul>
<li>From the Desktop, select Create > Case Work.</li>
<li>Select Out of Home Placement from the Placement dropdown field, select a Case and a Participant from the appropriate dropdown fields, and then click Create.</li>
<li>Out of Home Placement page displays on the Removal/Placement tab. Enter values for all required fields marked with blue highlights.</li>
<li>Select <u>Initial Removal Reasons</u> hyperlink</li>
<li>When you enter the Date of Removal in the Child Removal from Home Information page, the Removal Reasons group box displays. Click all applicable checkboxes on this page, which must include at least one AFCARS removal reason (indicated in red text). Then click Continue. The previous page displays.<br><br>*If this is <u>not</u> the initial Out of Home Placement episode for the child, the Child Removal From Home Information group box will be pre-populated.
<ul>
<li>Enter Time of Removal and click AM or PM checkbox, and then select dropdown field options for Manner, Primary Caregiver and Caregiver Structure.</li>
<li>From the Placement Begin group box, enter Placement Begin Date and Time, and then select dropdown options for Placement Type and Placement Setting.</li>
</ul></li>
<li>Select the Provider tab. Click the <u>Search</u> hyperlink, enter the Name of the Provider (at least the Last Name).</li>
<li>Click Search. If you do not find the provider you want to link to the service, you must create the provider. See the Provider How Do I…Guide.</li>
<li>If the provider is already created, the provider name will display in the Provider’s Returned field.</li>
<li>Select the radio button that corresponds with the correct Provider, and click Continue.</li>
<li>This will return to the Provider tab, with the Provider information pre-populated with the chosen provider.</li>
<li>If the placement type is a relative caregiver, complete the Relationship of Child to Relative Caregiver dropdown.</li>
<li>Return to the Removal and Placement tab, and submit for supervisory approval:
<ul>
<li>Select Approval from Options dropdown, and then click Go. Approval History page displays.</li>
<li>Select appropriate radio button option in the Approval Decision group box, and then click Continue. Out of Home Placement page displays.</li>
<li>Click Save.</li>
<li>If the child’s address is different than the chosen placement, a Validation Error box will appear asking, “Would you like the address of the provider to update the child’s current primary address?”.</li>
<li>Click Yes or No. The Out-of-Home Placement page will reappear.</li>
<li>Click Close.</li>
</ul></li>
</ul>
*If a living arrangement already exists, this will need to be modified in order to allow for an Out-of-Home Placement to be created.
</td><td>The Initial Removal Reasons page is used to document the reasons surrounding the removal of a child from his/her home.<br><br>After a child is placed, use the Out of Home Placement page to document the specific details of the placement and provider.</td></tr>
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<tr><th>How Do I…?</th><th>Selections</th><th>Tips & Guidelines</th></tr>
<tr><td>Document a Placement Exception Reason</td><td><ul><li>From the Out of Home Placement page, click Options dropdown menu, select Placement Exception Reasons, and then click Go.</li><li>If the Placement Exception box has been checked, review the FSFN Determined checkboxes indicated, to determine if the reason applies to the placement scenario being documented.</li><li>If applicable, select the Non-ICWA checkbox and click Continue.</li><li>If there is no Placement Exception, all fields will be grayed out and not modifiable.</li><li>Click Close. The Out of Home Placement page displays.</li></ul></td><td>The Placement Exception Reasons page contains two group boxes:<br><br>FSFN Determined –FSFN pre-fills these checkboxes, if applicable, based upon information specified in the associated Out-Of-Home Placement (as well as information already known to FSFN through the documentation of a provider's profile).<br><br>Social Worker Determined - this group box checkbox contains only one field, Non-ICWA, and it is user-modifiable. This checkbox is selected, if applicable, to document placement is not in accordance with ICWA.</td></tr>
<tr><td>End an Out of Home Placement</td><td><ul><li>From the Out of Home Placement page, select the Removal/Placement tab.</li><li>From the Options dropdown, select Removal Placement Ending, and then click Go.</li><li>Document the end date and time, Ending Purpose and End Reason..</li><li>Based on the end reason selected, FSFN determines if the end of the child's placement is a discharge from the removal episode.<ul><li>If the placement is a discharge from the removal episode, the Discharge Reason field becomes enabled and required, allowing the user to select a Discharge Reason.</li><li>If the system has determined an answer of "Yes" to "Is the End of This Child Placement a Discharge from the Removal Episode?" the child's Title IV-E Eligibility Determination will be ended.</li><li>If you select an End Reason that requires a Discharge, the "Is the End of This Child's Placement a Discharge the Removal Episode?" question will be set to "Yes," and the Discharge Reason field will become enabled and required.</li><li>The Override checkbox is enabled for the last out of home placement that has been ended for the child, without a discharge reason. This checkbox allows you to change the reason for which the out of home placement has ended even after approval of the placement/removal ending. The override checkbox is not enabled for placements that have a final discharge for the placement. After selecting the checkbox, the End Reason field will become enabled.</li></ul></li><li>Submit for supervisory approval:<ul><li>Select Approval from Options dropdown, and then click Go. Approval History page displays.</li><li>Select appropriate radio button option in the Approval Decision group box, and then click Continue. The Removal/Placement Ending page displays.</li></ul></li><li>Click Save, and then click Close. Out of Home Placement page displays. Click Close.</li></ul></td><td></td></tr>
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| How Do I…? | Selections | Tips & Guidelines |
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| View/Edit/Correct a Placement History | ▪ From the Desktop, select *Utilities* > *Placement Correction*. The Placement Corrections History page displays.<br>  ▪ If it is the first placement correction for the child, the Placement Correction History group box will be empty.<br>▪ From the Correction History page, select the Search hyperlink in the Child Information group box. The Search Person page displays.<br>▪ Search for the child, and select the Person Icon next to the child's name. Click on the child's Cases icon, then select the radio button next to the Case name. Then click **Continue**.<br><br>▪ The system pre-fills the Child's Information group box and the Placement Correction History group box will:<br>  ▪ Display Edit hyperlink next to a pending placement correction row. If selected, a pending placement correction record on the Placement History page displays in edit mode.<br>  ▪ Display View hyperlinks next to historical placement correction rows. If selected, a historical placement correction record on the Placement History page displays in view only mode. FSFN displays placements that were modifiable at the time the placement correction record was recorded<br>  ▪ Display View Current Placements hyperlink. If selected, the Placement History page displays with a list of all of the child's placement history across cases.<br>  ▪ Click **Create**, if a pending correction row does not exist. Then click **Save** which will enable the Insert button.<br>  ▪ Click *Insert*, and the Placement Correction Detail page appears. Enter the required field information highlighted in blue.<br>  ▪ Click the *Search* hyperlink, and search for the correct(ed) provider. If you do not find the provider you want to link to the service, you must create the provider. See the Provider How Do I…Guide.<br>  ▪ If the provider is already created, the provider name will display in the Provider's Returned field.<br>  ▪ Select the radio button that corresponds with the correct Provider, and click **Continue**.<br>  ▪ This will return to the Placement Correction Detail page, with the Provider information pre-populated with the chosen provider. There is also an opportunity to provide comments in an open text field.<br>  ▪ Enter all the required information highlighted in blue, and then click **Save**, then **Close**. The Placement History Page displays with a list of all of the child's placement history across cases.<br><br>▪ From the Placement History page, the user may:<br>  ▪ Select *Validate Corrections to Placement History* 'to see errors that exist for a case. This list does not include placements with the End Reason of Placement Made in Error.<br>  ▪ Determine if the placements are modifiable, have been modified, or have been inserted through the Placement Correction functionality (based on the Status column). Non-modifiable placements include placements that are open or placements that are undergoing payment processing.<br>  ▪ Edit existing placements, insert missing placements, and delete placement rows that were added via the Insert button. Only new placements added through the Placement Correction pages can be deleted via the Delete hyperlink prior to final approval. | *The Placement Correction History page displays all placement correction records for a specific child.*<br><br>*The Placement Correction History page has two levels of security, determined by the user's security profile:*<br><br>*A user with 'view-only' security settings is able to view a child's placement history across cases.*<br><br>*A user with 'modify' security settings is able to both view and modify a child's placement history.*<br><br>*The Placement History page is used to correct Placement History information entered in error, and to add historical placement details. The Placement History page displays placement information for a specific child and allows a user to modify each individual historical placement depending on how the user accesses the page.*<br><br>*FSFN allows the user to save work with errors. However, errors must be corrected prior to final approval.* |

| How Do I…? | Selections | Tips & Guidelines |
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| Create Interim Child Information Page | ▪ Select *Create > Case Work.*<br>▪ From the Ongoing Services items dropdown, select *Interim Child Information.*<br>▪ Select the appropriate Case and Case Participant, and then click **Create**. The Interim Child Information page displays. | *This page is an interim solution for Release 1 for capturing and displaying data documenting important information about a child's ongoing service case that is not currently captured elsewhere.*<br><br>*Select the Delete hyperlink next to an Eligibility Type, if you want to remove the row.*<br><br>*The child's name and corresponding case name are pre-filled by the system.* |
| Create Eligibility and School Information | ▪ Select the Basic tab.<br>▪ From the Eligibility group box, click **Insert**.<br>▪ In the new row, select the eligibility Information:<br>  ▪ Eligibil*ity Type*<br>  ▪ *Begin Date*<br>  ▪ *Redetermination Frequency*<br>  ▪ *If applicable, enter the End Date*<br>▪ From the School Information group box, enter school information:<br>  ▪ *School Name*<br>  ▪ *School D*istrict<br>▪ Click **Save**. | *Additional rows may be added to the Eligibility group box at any time.* |
| Create Legal Status, TPR Dates, Review Dates and Permanency Goal | ▪ On the Interim Child Information page Legal tab, click *Insert*.<br>▪ Enter applicable data values in the Legal Status group box.<br>▪ Enter TPR Dates for the mother and father, if applicable.<br>▪ To enter a Permanency Goal, click Insert in the Permanency Goal field. Enter the Permanency Goal date.<br>▪ To enter a Review Date, click Insert in the Review Date field. Enter the Review Date.<br>▪ Click **Save**.<br>▪ Click **Close**. | *Additional rows may be added to the Legal Status, Permanency Goal, and Review group box at any time.*<br><br>*Clicking the Insert button within the appropriate group box on this tab displays a new row. Additional rows may be added on this tab, if applicable, at any time.* |

| How Do I…? | Selections | Tips & Guidelines |
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| Create Adoption Factors Information | ▪ Select *Create* > *Case Work*, and then select *Interim Child Information* from the Ongoing Services dropdown field.<br>▪ Select the appropriate Case and Case Participant, and then click **Create**.<br><br>*If an Interim Child Information page has already been created, then this must be accessed through the Desktop using the Case icon expando for the child in question.<br><br>  ▪ On the Interim Child Information page/Adoption Factors tab, select *Adoption Finalized* checkbox, if enabled. This enables the five dropdown fields on the tab.<br>  ▪ Un-checking the 'Adoption Finalized checkbox will display the following message: "Un-checking the 'Adoption Finalized' checkbox will reset the values on this tab".<br>  ▪ Selecting *Yes* will reset the five dropdown values to Null and will disable the dropdown fields.<br>  ▪ Selecting *No* or *Cancel* will cancel the action. The checkbox will remain checked and the dropdown values will remain unchanged.<br>▪ Enter the appropriate information in the five dropdown fields. Click **Save**, and then click **Close**. | *Each time the Interim Child information page is opened FSFN checks to determine if the child for whose record is being created or accessed has a closed Out of Home Placement record where the placement type is 'Adoptive Home' and the placement End Reason is 'Adoption Finalized'. If these criteria are found to be true, then the 'Adoption Finalized' checkbox becomes enabled.* |
| Create Medical/ Mental Health Profile | ▪ Select Create > Case Work > Medical/Mental Health > Medical Profile. Select the appropriate Case and Case Participant.<br>▪ Click Create.<br>▪ On the Medical Profile tab, enter any applicable data. This tab must be saved for the Medical/Mental Health Profile to be created.<br><br>▪ When creating a Medications record: from the Medications tab, click Insert. The Medications page displays.<br>  ▪ Enter the required fields highlighted in blue and applicable data values, then click Save.<br>  ▪ To create a new Medical History record: From the Medical History tab, click on Insert.<br>  ▪ Enter the required fields and applicable data values, click Save, and then click Close. | *The Medical/Mental Health page is made up of four tabs. Complete all applicable fields on each tab to establish a medical/mental health profile:*<br>*Medical Profile tab is used to capture information regarding the Primary Health Care Providers and basic health problems pertaining to the participant.*<br>*Medications tab is used to document prescriptions, including psychotropic drug information, prescribing physician, and any issues relating to the prescriptions.*<br>*Mental Health Profile tab is used to document important mental health information about a Case Participant's current mental health treatment and transition information.*<br>*Medical History tab is used to document and update medical history information for case participants.* |

| Medical/Mental Health Information | | *Ongoing Casework How Do I…Guide* |
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| **How Do I…?** | **Selections** | **Tips & Guidelines** |
| Update Medical/Mental Health Profile | ▪ From the Desktop, drill down on the participant's Cases expando, and click on the Medical/Mental Health icon.<br>▪ Select the hyperlink associated with the appropriate participant.<br>▪ On the Medical Profile tab, update the applicable data/values.<br>▪ To update the Medications tab, select the Edit hyperlink next to the appropriate Medication record.<br>  ▪ Update the applicable data/values, and click **Save**.<br>▪ On the Mental Health Profile tab, update the applicable data values.<br>  ▪ To add an additional Medical History record, click **Insert**, enter the applicable data values, click **Save, and** then click **Close**. | |

| Services Referral | | *Ongoing Casework How Do I…Guide* |
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| **How Do I…?** | **Selections** | **Tips & Guidelines** |
| Create a Services Referral | ▪ From the Desktop, select *Create* > *Service Referral*. The Intake Inquiry Search page displays.<br>▪ Enter Last Name and First Name, and then click the Search button.<br>▪ If there *is not* a match, click the Close button in the message box. Click Create. The Create Person page displays.<br>  ▪ Enter Participant, Address, and Phone Information. Click Continue. The Address Normalization page displays.<br>  ▪ Click the appropriate radio button. Click Continue. The Intake Inquiry Search page displays.<br>  ▪ In the Participants group box, click Continue. The Intake page displays.<br>  ▪ Complete required Intake Information. Proceed to next section to Complete Service Referral.<br>▪ If there *is* a match, click the Select hyperlink next to the Participant in the Persons Returned group box. Click Add Participant(s).<br>  ▪ In the Participants group box, click Continue. The Intake page displays.<br>  ▪ Complete required Intake Information on the Participant's tab. Proceed to next section to complete the Service Referral. | *You must perform a Search on each participant. If no match is found, then you should complete the Create Person process for each participant.*<br><br>*Date Referral Received is system generated, but can be modified.* |

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<tr><td>Complete a Services Referral</td><td>
<ul>
<li>Select the Participants tab.
<ul>
<li>Click the <u>Roles</u> hyperlink to select a role for each participant. The Roles page displays.</li>
<li>Select roles, identifying one participant as the Intake Name.</li>
<li>Click Continue.</li>
<li>If applicable, click the Address Copy button.<br>Click Yes in the message box.<br>Select participants for Address Copy.<br>Click Save. Click Close. This returns to the Participants tab.</li>
<li>Click the Referral Information expando and enter applicable information.<br>If Caller ID N/A checkbox is not selected, Reporter Caller ID is a required field. Reporter Type is a required field.<br>Note: From the Referral Information group box, use right scroll bar to enter Source information field, if applicable.</li>
</ul></li>
<li>Select the Relationship tab.
<ul>
<li>Relationships group box displays row with three dropdown columns: Subject(s), Relationship, and Subject(s).</li>
<li>Adults will be displayed on the left and children on the right.</li>
<li>Select appropriate Relationship options.</li>
<li>Click <u>Insert</u> to enter a new relationship between participants.</li>
</ul></li>
<li>Select the Services tab.
<ul>
<li>Select a Service Referral from the Service Type drop down list.</li>
<li>Select a service from the Specific Services Requested group box if applicable.</li>
<li>Enter a Narrative.</li>
</ul></li>
<li>Select the Victim/Child Location tab.
<ul>
<li>If applicable, document directions to home and/or Worker Safety Concerns.</li>
</ul></li>
<li>Select the Prior Intakes and Service Records tab to view information.</li>
<li>Select the Decision tab.
<ul>
<li>Select the appropriate radio button in the Decision group box.</li>
<li>Select a Reason from the drop down list.</li>
</ul></li>
<li>Create/Link to a Case
<ul>
<li>Select the Create/Link Case hyperlink. Click Yes in the message box. Click Yes in the next message box.</li>
<li>Select the radio button for the case name and click Link or click Create to create a new case. The Maintain Case page displays.</li>
<li>If this is a new case, select Case Type and Family Structure.</li>
<li>Click Save.</li>
</ul></li>
</ul>
</td><td>Document the Roles for each participant.<br><br>No more than five roles may be selected for each participant.<br><br>An Incident (954) was written about the Reporter Terminology in a Service Referral.<br><br>The same participant can not occupy both subjects in the Relationships.</td></tr>
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