

# **Completing a Case Review**



## **Knowledge Base Article**

# Completing a Case Review

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# Completing a Case Review

## Overview

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

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

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

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

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

From the Ohio SACWIS Home Page:

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

## Completing a Case Review

The screenshot displays the 'Case Overview' page. On the left is a vertical navigation menu with various options. The 'Review Tools' option at the bottom is highlighted with a red rectangle. The main content area shows case details for an 'Ongoing' case, including a 'CONTACT' field and a 'SUPERVISOR(S)' field. Below this is a 'Case Actions' section with links for 'View Case Information', 'Linked Cases', 'Protect Ohio Category', and 'Case Status History'. A 'Hazards' section follows, containing a table with columns for 'Person / Address' and 'Hazard Type', listing 'Domestic Violence, Drug Activity'. At the bottom, a navigation bar includes links for 'Action Items', 'Case Alerts', 'Dashboard', and 'Assignments / Eligibility'.

**Case Overview**

- Activity Log
- Adverse Communication
- Initial List
- Safety Assessment
- Substance Abuse Screening
- Form Notices
- AR Pathway Switch
- Safety Plan
- Family Assessment
- Ongoing Case Adj
- Specialized Aft Tool
- Law Enforcement
- Justification/Owner
- Case Services
- Legal Actions
- Legal Custody/Status
- Living Arrangement
- Initial Removal
- Placement Request
- Placement
- Independent Living
- Violation Plans
- Case Plan Tools
- Review Tools**

CASE NAME / ID: [Redacted] Ongoing Open (10/25/2017) **HAZARD**

CONTACT: [Redacted]

SUPERVISOR(S): [Redacted]

Assign Worker

**Case Actions**

[View Case Information](#) | [Linked Cases](#) | [Protect Ohio Category](#) | [Case Status History](#)

**Hazards**

Person / Address	Hazard Type
[Redacted]	Domestic Violence, Drug Activity

Action Items Case Alerts Dashboard Assignments / Eligibility

The **Review Tools** screen appears.

### Completing a Case Review

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

## Completing a Case Review

**Review Tools Filter Criteria**

Review Tool:

Agency:

Approved Date:  

From Date

 - 

To Date

**Review Tools**

Plan Type:

Review Tool:

Add Review

	Review Tool	Status	Approved Date	Plan Name	Agency	
<a href="#">edit</a>	Case Review	In Progress		Updated Sept 9, 2016		<a href="#">edit</a> <a href="#">delete</a>
<a href="#">view</a>	Semiannual Administrative Review	<a href="#">Approved</a>	06/19/2016	Initial Mar 9, 2016		<a href="#">view</a>
<a href="#">view</a>	AR Family Service Review	<a href="#">Approved</a>	06/19/2016	Initial Mar 9, 2016		<a href="#">view</a>

Plan Type:

Review Tool:

Add Review

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

## Completing the Members to the Review Topic

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

## Completing a Case Review

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

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

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

**Case Review Topics** <

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

**Family Case Plan Information**

No Family Case Plan has been selected.

**Select Family Case Plan**

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

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

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

**Select Alternative Plan**

CASE NAME / ID: **[Redacted]** **Ongoing / Open (12/09/2018)**

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

**Available Family Case Plans**

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

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

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

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

## Completing a Case Review

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

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

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

# Completing a Case Review

Case / Workload / Case Review

Members to the Review

CASE NAME / ID: Doe, Jane / 000000000 [R]

Ongoing / Open (01/01/2014)

REVIEW TOOL: Case Review

REVIEW FOR PLAN: Initial Sept 22, 2016

STATUS: In Progress

Case Review Topics

Members to the Review

Completed

MR

Safety Reassessment

Not Completed

SR

Strengths and Needs Assessment

Not Completed

SN

Concern Review

Not Completed

CR

Visitation

Not Completed

V

Risk Reassessment

Not Completed

RR

Case Analysis

Not Completed

CA

Approval

A

Family Case Plan Information

Plan Type: Family Case Plan

Effective Date: 10/22/2016

Plan Name: Updated Sept 9, 2016

Last Case Review Date: 12/01/2016

Plan Developed By:

Review Event: 01/12/2016 - Legal Status

Plan Participant Signature Details Must be Recorded

Child(ren) in the Case Review

Doe, JoJo / 000000000

Female Age 9, DOB 07/01/2007

Protected under ICWA: No

Court Case / ID #: 000000

Child Location: Own Home

Agency Legal Status: Open Custody Episode, no Legal Status

Child's Permanency Goal: Reunification

Protected under ICWA: No

Court Case / ID #: 000000

Child Location: Own Home

Agency Legal Status: Open Custody Episode, no Legal Status

Child's Permanency Goal: Reunification

Adult(s) in the Case Review

Doe, Jane / 000000000

Female, Age 36, DOB: MM/DD/YYYY

Doe, John / 000000000

Male, Age 38, DOB: MM/DD/YYYY

Relationships

Family Dynamics

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

Expand Full Screen

ABC

1000

Previous Topic


Next Topic

Apply

Save

Cancel

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 Department of Children & Youth

Last Revised: 09/16/2024



# Completing a Case Review

## Adding Household Members

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

1. Click, Add New Household Member

The screenshot shows a header bar with a tab labeled "New Household Members". Below the header, a note states: "Note: Identify additional adults and children who have resided or are residing in the home during the period under review." A list of members is shown, with one entry: "Lammon, Pamela / 2926044 - Female". To the right of this entry is a trash can icon. Below the list is a button labeled "Add New Household Member". At the bottom, there is a text area for describing family interactions, with a link "(expand full screen)" and a button "ABC".

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

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

The screenshot shows the "Add New Household Member to Case Review" screen. At the top, a breadcrumb trail reads: "Case / Workload / Case Review / Members to the Review / Add New Household Member to Case Review". Below this, the title "Add New Household Member to Case Review" is displayed. A header bar contains the case name "Doe, Jane / 000000000 [R]" and the status "Ongoing / Open (01/01/2014)". Below the header, a table shows the review tool "Case Review", the review for plan "Initial Sept 22, 2016", and the status "In Progress". The main section is titled "New Household Member" and contains a table of "Available Persons". The table has a checkbox column and a name column. The names listed are: "Smith, Jane / 000000 - Associated Person", "Smith, Julia / 000000 - Associated Person", "Smith, Jennifer / 000000 - Case Member", "Smith, Jackie / 000000 - Case Member", "Smith, Jamie / 000000 - Associated Person", and "Smith, Josie / 000000 - Associated Person". At the bottom right, there are "Save" and "Cancel" buttons.

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

1. Click, **Next Topic**

## Completing a Case Review

Case / Workload / Case Review Members to the Review

CASE NAME / ID: Daft, Sandra / 768944 Ongoing / Open (09/13/2018)

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

Your data has been saved.

Case Review Topics < Family Case Plan Information

Members to the Review MR Plan Type: Family Case Plan Effective Date: 05/01/2019 - Adult Signature

Previous Topic Next Topic Apply Save Cancel

The **Safety Reassessment Topic** appears

### Completing the Safety Reassessment Topic

#### Safety Reassessment Summary

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

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

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

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

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

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

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

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

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

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

## Completing a Case Review

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

1. Click, **Safety Factors**.

### Case / Workload / Case Review / Safety Reassessment

Case Review Topics

Members to the Review

Completed

MIR

Safety Reassessment

Not Completed

SR

Strengths and Needs Assessment

Not Completed

SN

Concern Review

Not Completed

CR

Visitation

Not Completed

V

Risk Reassessment

Not Completed

RR

Case Analysis

Not Completed

CA

Approval

A

Safety Reassessment Summary

Current Safety Responses for the Review Period

Legally Authorized Out of Home Plan(s)

PLACEMENTJohnny Smith

Certified Foster Home

Begin Date:08/22/2015

Voluntary Safety Plan(s)

OUT OF HOMEJohnny Smith, Jimmy Smith, Jane Smith

Effective Date:08/22/2015

Status:Pending

Voluntary Safety Plan(s)

IN HOMEJohnny Smith, Jimmy Smith, Jane Smith

Effective Date:08/22/2015

Status:Effective-Final

Child(ren) determined to be safe; no Safety Plan in place:

Johnny Smith, Jimmy Smith, Jane Smith

Discontinued Safety Responses for the Review Period

Legally Authorized Plan(s)

Voluntary Safety Plan(s)

Safety Reassessment

Safety Factors

Child Vulnerability

Adult Protective Capacity

Safety Response

Safety Response Based On Assessment

IN HOME

Smith, Jane - Age 10

OUT OF HOME

Smith, Maggie - Age 8

OUT OF HOME

Smith, Alexander - Age 5

The **Safety Factors** tab screen appears.

## Completing the Safety Factors Tab

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

## Completing a Case Review

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

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

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

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

The screenshot shows the 'Safety Factors' tab in a case review system. The breadcrumb trail at the top is 'Case / Workload / Case Review / Safety Reassessment'. The 'Safety Factors' tab is highlighted. Below the breadcrumb, there is a header bar with 'CASE NAME / ID' and 'Ongoing / Open (03/09/2018)'. The 'REVIEW TOOL' is 'Case Review', and the 'REVIEW FOR PLAN' is 'Updated Aug 12, 2019'. The 'STATUS' is 'In progress'. A green message bar says 'Your data has been saved.' Below this, there are four tabs: 'Safety Factors', 'Child Vulnerability', 'Adult Protective Capacity', and 'Safety Response'. The 'Safety Factors' tab is active. The first question is '1. Child has inflicted physical injuries.' with a 'Field Guide' link. Below the question is a list of examples to support a 'Yes' response for the safety factor, including cuts requiring stitches, broken bones, burns, internal injuries, head injuries, and serious injury to sensitive body areas. There are also checkboxes for 'Brain damage', 'Injuries resulting in permanent sight, hearing or mental impairment', 'Extensive or multiple bruising and/or other injury which may cover more than one area of the body', 'Extensive and multiple bruises or broken bones in various stages of healing which indicate a pattern of abuse', 'Non-accidental injuries to an infant (ages 0-12 months)', and 'Other, not listed'. At the bottom of the question, there are three radio buttons: 'Not Answered' (selected), 'Yes', and 'No'. The second question is '2. Caretaker has not, cannot, or will not protect the child from potential serious harm, including harm from other persons having familial access to the child.' with a 'Field Guide' link. Below the question is a list of examples to support a 'Yes' response for the safety factor, including caretaker does not recognize need to protect child, caretaker denies the abuse/neglect and refuses to acknowledge any problem, caretaker vacillates in commitment to protect the child, adult rationalizes lack of intervention or blames the child for the abuse and/or neglect, due to cognitive, emotional or physical limitations, the caretaker is unable to protect the child from the perpetrator, adult knowingly places child at risk, and caretaker verbalizes a need to protect child, but remains supportive of the alleged perpetrator. At the bottom of the question, there are three radio buttons: 'Not Answered' (selected), 'Yes', and 'No'. At the bottom of the page, there is a navigation bar with buttons: 'Previous', 'Next' (highlighted), 'Apply', 'Save', and 'Cancel'.

The **Child Vulnerability** tab page appears.

## Completing the Child Vulnerability Tab

**Note:**

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

## Completing a Case Review

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

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

**Note:** The screen will expand.

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

3. Click, **Next**.

Case / Workload / Case Review / Safety Reassessment  
Child Vulnerability

CASE NAME / ID: Thompson, Wyatt - Male Age 8 Ongoing / Open (03/09/2018)

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

✓ Your data has been saved.

Safety Factors Child Vulnerability Adult Protective Capacity Safety Response

Child Vulnerability

Thompson, Wyatt - Male Age 8 Not Completed

Child Vulnerability ^

1. Child has a physical vulnerability: [Field Guide ^](#)

Examples to assist in the identification of a vulnerability

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

☐ Not Assessed 
 ☒ Yes 
 ☐ No

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

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

Examples to assist in the identification of a vulnerability

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

☐ Not Assessed 
 ☐ Yes 
 ☐ No

Previous **Next** Apply Save Cancel

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

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

## Completing a Case Review

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

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

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

Safety Factors Child Vulnerability Adult Protective Capacity Safety Response

Child Vulnerability

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

Smith, Jane - Female - Age 14 DECEASED Completed

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

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

Smith, Morgan - Female - Age 17 DECEASED Not Completed

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

Previous Next Apply Save Cancel

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

### Completing the Adult Protective Capacity Tab

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

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

## Completing a Case Review

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

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

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

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

**Adult Protective Capacity**

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

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

☐ Not Answered ☐ Yes ☐ No

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

✓ ABC  
1000

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

☐ Not Answered ☐ Yes ☒ No

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

✓ ABC  
1000

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

☒ Not Answered ☐ Yes ☐ No

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

The **Safety Response** tab page appears.

### Completing the Safety Response Tab

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


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


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

## Completing a Case Review

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

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

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

 The Person record information does not indicate this person is deceased

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



## Completing a Case Review

The screenshot shows the 'Safety Response' tab in a case review process. At the top, a navigation bar includes 'Safety Factors', 'Child Vulnerability', 'Adult Protective Capacity', and 'Safety Response' (which is highlighted). Below this, a section titled 'Recommended Safety Response' contains a sub-header 'Recommended Safety Response for Each Child:'. Under this, there are three rows for children: 'Smith, Jane - Age 10', 'Smith, Maggie - Age 8', and 'Smith, Alexander - Age 5', each with a dropdown menu. Below these is a section for 'Rationale to Support the Safety Response Identified for the Child(ren):' with a text area and a 'Provide a rationale for each safety response selected.' instruction. A red rectangle highlights the text area. To the right of the text area are buttons for 'ABC' and '1000'. At the bottom, a dark bar contains 'Previous', 'Next', 'Apply', 'Save' (highlighted with a red rectangle), and 'Cancel' buttons.

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

The screenshot shows the 'Safety Reassessment Summary' page. At the top, a breadcrumb trail reads 'Case / Workload / Case Review / Safety Reassessment'. Below this, a header bar shows 'CASE NAME / ID: [redacted]' and 'Ongoing / Open (09/13/2018)'. A second bar shows 'REVIEW TOOL: Case Review', 'REVIEW FOR PLAN: Updated Aug 19, 2019', and 'STATUS: In progress'. A green message bar states 'Your data has been saved.' Below this, a 'Case Review Topics' sidebar on the left lists various topics with status indicators: 'Members to the Review' (Completed), 'Safety Reassessment' (Completed and highlighted with a green rectangle), 'Strengths and Needs Assessment' (Not Completed), 'Concern Review' (Not Completed), 'Visitation' (Not Completed), 'Risk Reassessment' (Not Completed), and 'Case Analysis' (Not Completed). The main content area, titled 'Safety Reassessment Summary', shows a list of completed items: 'Safety Factors', 'Child Vulnerability', 'Adult Protective Capacity', and 'Safety Response'. Below this, a section titled 'Safety Response Based On Assessment' contains a blue box with 'SAFE' and 'SAFE' buttons, which is also highlighted with a green rectangle. At the bottom, a dark bar contains 'Previous Topic', 'Next Topic', and 'Close' buttons.

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

## Completing the Strengths and Needs Topic

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

## Completing a Case Review

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

### Completing the Child Functioning Tab

1. Click, **Child Functioning**.

The screenshot shows the 'Case Review' interface. At the top, there is a breadcrumb trail: 'Case / Workload / Case Review / Strengths and Needs Assessment'. Below this is a header bar with 'CASE NAME / ID:' followed by a blue box and 'Ongoing / Open (12/30/2018)'. Below the header bar is a section with 'REVIEW TOOL: Case Review', 'REVIEW FOR PLAN: Initial May 22, 2019', and 'STATUS: In progress'. The main content area is titled 'Case Review Topics' and contains a list of topics: 'Members to the Review' (MR), 'Safety Reassessment' (SR), 'Strengths and Needs Assessment' (SN), and 'Concern Review' (CR). The 'Strengths and Needs Assessment' (SN) topic is selected, and its sub-topics are listed: 'Child Functioning' (Not Completed), 'Adult Functioning' (Not Completed), 'Family Functioning' (Not Completed), and 'Historical Functioning' (Not Completed). The 'Child Functioning' sub-topic is highlighted with a red box.

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

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

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

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

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

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

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

## Completing a Case Review

Child Functioning

Adult Functioning

Family Functioning

Historical Functioning

Emotional/Behavioral Functioning

Field Guide

Collapse all Field Guides

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

☐ Is argumentative with caregiver.

☐ Seeks negative attention by agitating others.

☐ Overreacts to audible noises.

☐ Is overly sensitive to physical touch.

☐ Lacks the ability to deescalate self.

☐ Demonstrates sexually provocative behaviors.

☐ Involved with juvenile court.

☐ Exhibits anti-social behavior.

☐ Engages in committing crimes.

☐ Is oppositional to authority (parent, teachers, neighbors, other adults).

☐ Continues to incite adult even after hostile exchange begins.

☐ Has an eating disorder.

☐ Cries excessively.

☐ Has a high energy level; in constant motion.

☐ Unable to soothe self.

☐ Runs away from home.

☐ Uses or has an addiction to alcohol and/or drugs.

☐ Resistant to toilet training.

☐ Is defiant to caregiver/authority.

☐ Requires intense emotional support from his or her caretaker.

☐ Does not demonstrate an attachment to his or her caretaker.

☐ Unable to tolerate frustration.

☐ Behavior escalates in response to limit-setting or punishment by caretaker.

☐ Does not demonstrate an attachment to his or her caretaker.

☐ Is sexually and/or physically aggressive toward other children.

☐ Is defiant to caregiver/authority.

☐ Other, not listed

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

☒ Not Answered ☐ Risk Contributor ☐ Non-Risk Contributor

Provide a description of this element for this child:

✓ ABC

1000

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

### Completing the Adult Functioning Tab

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

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

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

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

## Completing a Case Review

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

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

**Cognitive Abilities**

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

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

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

☒ Not Answered ☐ Risk Contributor ☐ Non-Risk Contributor

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

☒ Not Answered ☐ Risk Contributor ☐ Non-Risk Contributor

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

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

The **Family Functioning Tab** page appears.

## Completing the Family Functioning Tab

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

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

- Family Roles, Interactions, and Relationships
  - Resource Management
  - Extended Family, Social and Community Connectedness
1. Place a checkmark(s) in the check box(es) beside any applicable risk factor(s) listed as, **Examples of Risk Contributors for this element** list. THIS IS NOT REQUIRED.

## Completing a Case Review

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

The screenshot shows the 'Historical Functioning' tab selected in a case review interface. The tab is part of a sequence including 'Child Functioning', 'Adult Functioning', 'Family Functioning', and 'Historical Functioning'. Below the tab, the section is titled 'Family Roles, Interactions, and Relationships'. A 'Field Guide' link is visible. The main content area lists 'Examples of Risk Contributors for this element (check all that apply):' with two columns of checkboxes. Below this list, there is a section 'Identified as a Risk Contributor within Concern(s)' with three radio buttons: 'Not Answered', 'Risk Contributor', and 'Non-Risk Contributor'. The 'Risk Contributor' option is selected. Below the radio buttons is a text box labeled 'Provide a description of this element for this family:'. To the right of the text box is a button labeled 'ABC' with a checkmark and a '1000' character count. At the bottom of the form, there are navigation buttons: 'Previous', 'Next', 'Apply', 'Save', and 'Cancel'. The 'Next' button is highlighted with a red box.

The **Historical Functioning** tab page appears.

### Completing the Historical Functioning Tab

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

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

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

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

## Completing a Case Review

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

**Caretaker's Victimization of Other Children**

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

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

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

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

☒ Not Answered ☐ Risk Contributor ☐ Non-Risk Contributor

Provide a description of this element for this adult:

✓ ABC  
1000

---

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

☒ Not Answered ☐ Risk Contributor ☐ Non-Risk Contributor

Provide a description of this element for this adult:

✓ ABC  
1000

Previous Next Apply **Save** Cancel

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

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

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

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

5. Click **Next Topic**.

## Completing a Case Review

Your data has been saved.

Case Review Topics

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

**Strengths and Needs Assessment**

Child Functioning Completed  
Assessment Responses

	Child Name	Risk Contributor	Non-Risk Contributor
Self Protection			✓
Physical/Cognitive/Social Development			✓
Emotional/Behavioral Functioning			✓

Adult Functioning Completed  
Assessment Responses

Family Functioning Completed  
Assessment Responses

Historical Functioning Completed  
Assessment Responses

Previous Topic **Next Topic** Close

The **Concern Review** topic page appears.

### Completing the Concern Review Topic

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

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

1. Click, **edit progress**.

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

## Completing a Case Review

Case / Workload / Case Review

Concern Review

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

REVIEW TOOL: Case Review

REVIEW FOR PLAN: Initial Sept 22, 2016

STATUS: In Progress

Case Review Topics

Members to the Review

MR

Completed

Safety Reassessment

SR

Not Completed

Strengths and Needs Assessment

SN

Not Completed

Concern Review

CR

Not Completed

Visitation

V

Not Completed

Risk Reassessment

RR

Not Completed

Active Concerns

edit progress

What is the Concern:

The potentially 10,000 character narrative would be displayed here. The potentially 10,000 character narrative would be displayed here. The potentially 10,000 character narrative would be displayed here. The potentially 10,000 character narrative would be displayed here. The potentially 10,000 character narrative would be displayed here. The potentially 10,000 character narrative would be displayed here... [Show More](#)

[Risk Contributors](#)

[Non-Risk Contributors](#)

edit progress

What is the Concern:

The potentially 10,000 character narrative would be displayed here. The potentially 10,000 character narrative would be displayed here. The potentially 10,000 character narrative would be displayed here. The potentially 10,000 character narrative would be displayed here. The potentially 10,000 character narrative would be displayed here. The potentially 10,000 character narrative would be displayed here... [Show More](#)

[Risk Contributors](#)

[Non-Risk Contributors](#)

**Note:** The system will display the Concern records that were marked as completed since the last Approved Case Review in the **Concerns Completed During this Review Period** grid.

2. Click, **view**.

Concerns Completed During this Review Period	
<a href="#">view</a>	<p>What is the Concern: The potentially 10,000 character narrative would be displayed here. The potentially 10,000 character narrative would be displayed here. The potentially 10,000 character narrative would be displayed here. The potentially 10,000 character narrative would be displayed here. The potentially 10,000 character narrative would be displayed here. The potentially 10,000 character narrative would be displayed here. The potentially 10,000 character narrative would be displayed here. The potentially 10,000 character narrative would be displayed here. The potentially 10,000 character narrative would be displayed here... <a href="#">Show More</a></p> <p><a href="#">Completion Details</a> ^</p> <p>Completion Date: &lt;MM/DD/YYYY&gt;</p> <p>Describe the condition(s) which resulted in this family case plan concern being completed or removed:</p> <p>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce a magna nec ipsum posuere pretium. Phasellus et ligula imperdiet, lacinia magna eu, pellentesque urna. Donec vel viverra quam, id ullamcorper sapien. Quisque ut ornare urna. Donec lobortis ex eget est volutpat malesuada. Cras ac euismod justo. Interdum et malesuada fames ac ante ipsum primis in faucibus. Fusce non purus ultrices, accumsan diam eu, feugiat nisi. Orci varius natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Vivamus et ornare lorem. Donec ut mi rhoncus, placerat leo vitae, semper tortor.</p>



## Completing a Case Review

**Note:** There will also be drawers that will only display when there are Successfully completed Services and End-Dated Services.

**Important: *\*For the purposes of the Case Review, case services will NO LONGER require a Service Review.\****

## Concern Review Details

### Concern Review Details

**What is the Concern:**

[illegible]

### Risk Contributors ▼

### Non-Risk Contributors ▼

[Linked Services](#) 

Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates
---------------------	-------------------------	------------------------	-----------------

[view](#) Smith, John

Case Management/Case Management Services

Case Member

01/01/2000 -

[Case Member / Caregiver History](#) ▼

### Successfully Completed Services

Case Member Name(s)	Service Description	Status	Effective Dates
---------------------	---------------------	--------	-----------------

Smith, John

### Individual Counseling

Provided

01/01/2000 - 01/01/2000

[End-Dated Services](#) 

Case Member Name(s)	Service Description	Status	End Reason	Effective Dates
---------------------	---------------------	--------	------------	-----------------

Smith, John

Individual Counseling

Provided

End reason text

01/01/2000 - 01/01/2000

**Important:** The system will display all elements that are linked to the associated Concern record where the rating changed (Risk Contributor to Non-Risk Contributor and vice-versa) during the Strength and Needs Assessment in this Case Review.

### Changes from Strengths and Needs Assessment

Child Functioning

### Emotional/Behavioral Functioning

Smith, Jimmy - Age 10

Changed from a *Risk Contributor* to a *Non-Risk Contributor*

Smith, Johnny - Age 10

Changed from a *Risk Contributor* to a *Strength*

### Adult Functioning

## Domestic Relations

Smith, Jane - Age 30.

Changed from a *Non-Risk Contributor* to a *Risk Contributor*

Smith, Jacob - Age 30

Changed from a *Non-Risk Contributor* to a *Risk Contributor*

## Completing a Case Review

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

**Progress**

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

✓ ABC  
4000

Smith, Jimmy / 0000000 Male Age 1	Progress toward Addressing Concern:	<div></div>
Smith, Janey / 0000000 Female Age 12	Progress toward Addressing Concern:	<div></div>
Smith, John / 0000000 Male Age 26	Progress toward Addressing Concern:	<div></div>
Smith, Jane / 0000000 Female Age 26	Progress toward Addressing Concern:	<div></div>

Proposed Action for this Concern:

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

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

4. Click **Next**.

## Completing a Case Review

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

### Completing the Visitation Topic

### Completing the Adult Visitation Tab

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

Adult Visitation	Sibling Visitation	Caseworker Visits
<b>Child(ren) with No Adult Visitors</b>		
<i>If the following child(ren) have adult visitors OR their justification needs modified, please update the Family Case Plan.</i>		
<b>Charlesworth-Dewitt, Jason Circularsaw - Male Age 3</b>		
Justification for not having adult visitors: This is where there would be a justification text that is read only presented here for all to read. The justification could range up to 1000 characters. This is where there would be a justification text that is read only presented here for all to read. The justification could range up to 1000 characters. This is where there would be a justification text that is read only presented here for all to read. The justification could range up to 1000 characters.		

1. Click the **Actions** drawer.

Adult Visitation Summary	
Dewitt, John Wayne Dubois [H]	<b>Actions ...</b>
Visiting 2 times monthly in Agency Setting for 2 hours	<b>RESTRICTED</b> <b>SUPERVISED</b>
Charlesworth-Dewitt, Jack Sawsall - Male Age 9	
<a href="#">Visitation Information</a> ▼	
Visiting 3 times monthly in Neutral Setting for 1 hour	
Charlesworth-Dewitt, Janey Hacksaw - Female Age 12	
<a href="#">Visitation Information</a> ▼	
Visiting 4 times monthly in Agency Setting for 2 hours	
<b>SUPERVISED</b>	
Charlesworth-Dewitt, Jimmy Chainsaw - Male Age 10	
Charlesworth-Dewitt, Jessa Bandsaw - Female Age 8	
<a href="#">Visitation Information</a> ▼	

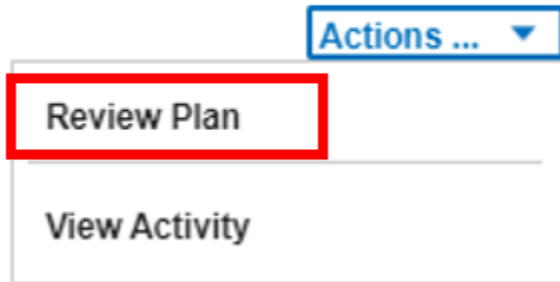
The drawer will expand.

1. Select, **Review Plan**.

## Completing a Case Review

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

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



The **Visitation Review** grid appears.

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

## Completing a Case Review

Visitation Review

Dewitt, Betty Machete [H]

Visiting 1 times weekly in Neutral Setting for 4 hours  
Charlesworth-Dewitt, Janey Hacksaw - Female Age 12  
Charlesworth-Dewitt, Jimmy Chainsaw - Male Age 10  
Charlesworth-Dewitt, Jack Sawsall - Male Age 9  
Charlesworth-Dewitt, Jessa Bandsaw - Female Age 8

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

☐ Not Answered ☐ Yes ☐ No ☒ Visiting some children, but not all

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

✓ ABC  
4000

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

✓ ABC  
4000

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

☐ Not Answered ☐ Yes ☐ No

Apply to Other Adults

⚠ Selecting an option below will override any existing responses.

Adult Name

☐ Smith, Jarob - Male, Age 30  
☒ Smith, John - Male, Age 40

Apply

Save

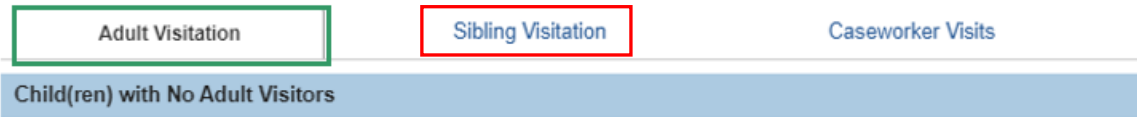
Cancel

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

## Completing a Case Review

### Completing the Sibling Visitation Tab

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



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

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

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

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

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

## Completing a Case Review

Case / Workload / Case Review / Visitation

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

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

Case Review Topics

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

Adult Visitation Sibling Visitation Caseworker Visits

**Siblings Not Visiting Each Other**

Jimmy is not visiting Jessa or Jack

Describe the reason the siblings are not visiting:

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

**Siblings Who May Visit Each Other**

Jimmy, Janey, Katlynn and Jack are visiting each other

[Details](#)

Siblings in agency custody who are visiting each other:

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

Other siblings/child(ren) who are visiting:

- Dewitt, Katlynn Copingsaw - Female Age 13

Description of sibling visitation:

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

Jack and Jessa are visiting each other

[Details](#)

[Actions ...](#)

Review Plan

View Activity

**Note:** Click, View Activity.

The **Visitation Review** page appears.

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

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

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

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

## Completing a Case Review

**Visitation Review**

Jimmy, Janey, Katlynn and Jack are visiting each other

Have visits occurred between the above siblings?

☐ Not Answered   ☐ Yes   ☐ No   ☒ Some siblings visiting, but not all

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

✓ ABC  
4000

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

✓ ABC  
4000

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

☐ Not Answered   ☐ Yes   ☐ No

### Completing the Caseworker Visits tab

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

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

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



## Completing a Case Review

[Adult Visitation](#)[Sibling Visitation](#)[Caseworker Visits](#)

Caseworker Visitation Summary

[View Face to Face Visits](#)

Describe the frequency and quality of caseworker visits with child(ren), which have occurred since the last assessment or review.

[Expand Full Screen](#)

✓ ABC

1000

Describe the frequency and quality of caseworker visits with the parent, caretaker, and other adults which have occurred since the last assessment or review.

[Expand Full Screen](#)

✓ ABC

1000

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

### Completing the Risk Reassessment Topic

1. In the **Risk Reassessment** grid, use the radio buttons (or check boxes, when necessary) to respond to the information being requested.  
**Important:** Each Field Guide drawer expands to provide detailed instruction/explanation for answering the questions.
2. If Applicable, enter narrative in response to: **Describe reasons for any policy/discretionary override(s).**
3. Click, **Calculate Scores.**

# Completing a Case Review

Case / Workload / Case Review / Risk Reassessment

CASE NAME / ID: Ongoing / Open (12/06/2018)

REVIEW TOOL: Case Review REVIEW FOR PLAN: Initial Apr 15, 2019 STATUS: In progress

**Case Review Topics**

- Members to the Review ☒ Completed
- Safety Reassessment ☒ Completed
- Strengths and Needs Assessment ☒ Completed
- Concern Review ☒ Completed
- Visitation ☒ Completed
- Risk Reassessment ☐ Not Completed**

**Risk Reassessment**

R1: Number of Prior Reports  
Historical Intakes: 3  
Field Guide

R2: Number of Children in the Home (at the time of most recent report)  
Field Guide

R3: Number of Adults in the Home (at the time of most recent report)  
Field Guide

R4: Current Age of Primary Caregiver  
Field Guide

Have any of the following occurred during the period under review:  
The conditions associated with the policy override must have occurred during the reassessment period.

- ☒ An in-home or out-of-home safety plan is still active
- ☐ A non-accidental physical injury to any age child requiring medical treatment
- ☐ Death (previous or current) of a caregiver's child or any other child in their care as a result of abuse or neglect
- ☐ Sexual abuse cases where the alleged perpetrator is likely to have immediate access to the child victim
- ☐ Cases with non-accidental physical injury to an infant
- ☐ Positive toxicology screen of child at birth

Describe reasons for any policy/discretionary override(s): [\(expand full screen\)](#)

ABC 3970

**Calculate Scores** Actual Risk Level:

Click **Next** and the Case Analysis page appears.

## Completing the Case Analysis Topic

1. Select from the **Agency Involvement** drop-down menu. There are two options:
  - **Continue Agency Involvement - Family in need of Agency Services**
  - **Terminate Agency Services**

If you select, Continue Agency Involvement – Family in need of Agency Services, the screen will expand, requiring additional information (see screen below).

2. Place a checkmark(s) in the checkbox(es) that describes the family's need for continued agency involvement.
3. Enter narrative in response to: **Describe the reasons for the case status selected above. Discuss how the risk reassessment safety review, family perception, case progress review, including strengths and needs summary and services review informs a change readiness of the family, permanency planning and service provision. If case is being closed, provide a summary justifying case closure.**
4. Select, **Yes** or **No**, from the, **Will the Family Case Plan be updated as a result of this review** drop-down menu.

## Completing a Case Review

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

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

Case / Workload / Case Review Case Analysis

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

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

**Case Review Topics**

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

**Case Analysis**

Agency Involvement:

Continue Agency Involvement - Family in need of Agency Services

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

☐ In-Home Supportive Services

☐ Protective Supervision

☐ Out-of-Home Placement

Upcoming Court Hearings

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

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

Available Update Reasons

Add

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

Selected Update Reasons

Remove

Previous Topic Next Topic Apply Save Cancel

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

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

# Completing a Case Review

Case / Workload / Case Review / Case Analysis

CASE NAME / ID:   Ongoing / Open (12/03/2018)

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

**Case Review Topics**

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

**Case Analysis**

Agency Involvement:

Terminate Agency Services

Reason for Termination:

Family No Longer in Need of Agency Services

Risk decreased to low or moderate and no active safety threats

Family unable to be located

Legal Custody to Third Party

Family Refused Services and Court decision denied

Services Terminated Against Agency Recommendation

Adoption Finalized

Family moved Out of state and referral made

Only child in home deceased

Family moved out of country and ongoing transfer denied

[Upcoming Court Hearings](#)

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

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

Available Update Reasons

Add

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

Selected Update Reasons

Remove

Previous Topic: **Next Topic:** Apply Save Cancel

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

## Completing the Approval Topic

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

# Completing a Case Review

## Approval Information

### Visitation

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

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

### Risk Reassessment - Safety factors

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

### Strengths and Needs Assessment - Child Functioning

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

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

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

The screenshot shows the 'Case Review' interface. At the top, there's a breadcrumb trail: 'Case / Workload / Case Review / Approval'. Below this, a header bar indicates 'Ongoing / Open (12/06/2018)'. A status bar shows 'REVIEW TOOL: Case Review', 'REVIEW FOR PLAN: Initial: Apr 15, 2019', and 'STATUS: In progress'. A green notification bar states 'Your data has been saved.' Below this, the 'Case Review Topics' sidebar lists several items: 'Members to the Review' (Completed), 'Safety Reassessment' (Completed), 'Strengths and Needs Assessment' (Completed), 'Concerns Review' (Completed), and 'Visitation' (Completed). The main content area is titled 'Approval Information' and contains the text 'This Case Review is ready for approval.' A red box highlights the 'Submit for Approval' button.

The **Process Approval** grid appears.

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

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

## Completing a Case Review

**Process Approval**

Work Item

ID: [ ] Task ID: [ ] Type: CASE Task Type: Review Tool Reference: [ ] Task Reference: [ ] Task Status: [ ]

Routing/Approval Action

Action: \* [ Please Select An Action ]

Comments: [ ]

Agency: [ ]

Reviewers/ Approvers: [ Please Select A Reviewer/Approver ]

**Save**

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

**Review Tools**

Case Overview

Case Name: [ ] Ongoing Open (12/06/2018)

Review Tools Filter Criteria

Review Tool: [ ] Agency: [ Adair County Children Services Board ]

Approved Date: [ ] From Date: [ ] To Date: [ ]

**Filter**

Review Tool	Status	Approved Date	Plan Name	Agency
Case Review	In Progress	04/00/2019	Initial Apr 15, 2019	[ ]

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