

Ohio SACWIS Project

CM09a Record Placement Requests

Version 2.4

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Prepared for:



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Revision Log

Version	Date	A/D/C (Add, Delete, Change)	Author	Document Section #	Description
1.0	03/31/2005		M. Stubbs		Initial version
2.0	04/07/2005	A/D/C	M. Stubbs	All	Final JAD Version
2.1	04/11/2005	D/C	S. Hollingshead	3,4, 6	Remove unlink provider function.
2.2	4/12/2005	A	S. Hollingshead	6, 7	Additional Business Rules, updated ref data
2.3	04/25/2005	C	M. Stubbs	3, 6	Addition of two scenarios Update of Business Rules
2.4	04/28/2005	A/D/C	M. Stubbs	3, 6	Removal of two scenarios Update of Business Rules

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1 Description

This use case describes the steps a worker takes to document Placement Requests information for a child. The use case also documents the steps a Caseworker takes to record a placement record for the child upon selection of a provider.

2 Characteristic Information



Name	CM09a Record Placement Requests
Scope	 Business – Case Management
Level	 - Primary Task
Actor(s)	<p>Caseworker - A generic term for an agency employee who can be assigned to tasks that are common to all caseworkers.</p> <p>Worker - This is a generic term for someone with general access to SACWIS having the capability to read and perform tasks that all employees will be able to perform.</p>
Stakeholders and Interests	<ol style="list-style-type: none"> 1. Service Provider 2. Child(ren) 3. Parent/guardian/custodian 4. Case Participants 5. Guardian ad litem 6. Court appointed special advocate 7. Kin/relative who is providing care for the child 8. The pre-adoptive parent 9. Child's attorney 10. Court 11. Tribe - Extended Family (ICWA) 12. PCPA 13. PCSA 14. Local CDJFS 15. Substitute Caregivers 16. ODJFS 17. State ICPC Worker
Pre-conditions	N/A
Post-conditions	Child Placement Request information has been recorded.
Trigger(s)	The Caseworker requests the System add a Placement Request Record.
Requirements Addressed	RFP37.2, RFP270, RFP271

Figure 1 – Characteristic Information

3 Basic Flow

3.1 Usage Examples and Narratives

Example 1: Worker needs to navigate the Placement Request List Page.

Example 2: Worker wishes to filter list page criteria.

Example 3: Caseworker wishes to add a Placement Request Record.

Example 4: Caseworker wishes to edit a Placement Request Record.

Example 5: Caseworker needs to delete a Placement Request Record.

Example 6: Worker wishes to view a Placement Requests Record.

Example 7: Caseworker wishes to link a Provider to the Child's Placement Request Record.

Example 8: Worker wishes to view a Provider Record in a Placement Request Record.

Example 9: Caseworker wishes to record a Placement Record.

3.2 Main Success Scenarios

Scenario 1: Navigate Placement Requests List Page

1. Worker request System present Placement Requests List page.
2. System presents Placement Requests List page.
3. Caseworker optionally executes one of Scenarios 2-4. Worker optionally executes Scenario 4.

Scenario 2: Filter List Page

1. Worker enters search/filter criteria.
2. Worker requests System 'Filter'.
3. System presents filtered view of the Placement Records list.

Scenario 3: Add Placement Request Record

1. Caseworker requests System add Placement Request Record.
2. System presents Request Information page.
3. Caseworker enters information.
4. Caseworker optionally executes scenario 7-10.
5. Caseworker requests System save record.
6. System validates and saves record; returns to the Placement Requests List Page.

Scenario 4: Edit Placement Request Record

1. Caseworker requests System edit selected Placement Request Record.

2. System presents Request Information for selected Placement Request Record in edit mode.
3. Caseworker optionally completes Steps 3-10 of Scenario 3.

Scenario 5: Delete Placement Request Record

1. Caseworker requests System delete the selected Placement Request Record.
2. System asks caseworker “Are you sure you want to delete this Placement Request Record, OK or Cancel?”
3. Caseworker selects ‘OK’.
4. System deletes the selected Placement Request Record.

Scenario 6: View Placement Request Record

1. Worker requests System view selected Placement Requests Record.
2. System presents Placement Requests Record in view mode.
3. Worker views information.
4. Worker optionally executes Scenario 8.
5. Worker requests System close record.
6. System closes record and returns to the Placement Requests List page.

Scenario 7: Link Provider to Placement Request Record

1. Caseworker requests System Link provider to Service Record.
2. System presents Match Provider page (RM19a-Match Client with Provider) pre-filled with Service Information, Agency Information and Child Information.
3. Caseworker executes Scenario 2 of RM19a.

Scenario 8: View Provider Record in a Placement Request Record

1. Worker requests System view selected Provider Record.
2. System presents Provider Overview Page in view mode (See RM32-View Provider Overview)
3. Worker optionally views information.
4. Worker optionally navigates through the Provider Record. (SEE RMSUM-Navigate Provider Record).
5. Worker requests System close record.
6. System closes record and returns to the Potential Matches page of the record.

Scenario 9: Record a Placement from the Placement Request Record

1. Caseworker requests System ‘Record Placement’ for the ‘Accepted’ Provider.

2. System validates and saves Placement Request record; presents Services page of the Placement Record. (See CM09-Record Placement Information).
3. Caseworker optionally enters information.
4. Caseworker requests System save Placement Record.
5. System validates and saves Placement Record; returns to Placement Request Record.

4 Alternate Flows

The View Scenario mentioned in this use case has no alternate flows.

2a AF Condition 1.

3a.1 System presents a data validation error message alerting the Worker that required fields were entered incorrectly. The Worker can return to area needing correction.

3a-4a AF Condition 1.

14a.1 Caseworker requests System apply information.

15a.1 System verifies and saves information and does not close page.

3b-4b AF Condition 2.

14b.1 Caseworker requests System cancel information.

15b.1 System cancels information and closes page; returns to Placement Requests List Page.

3c-4c AF Condition 3.

15c.1 System presents a data validation error message alerting the Caseworker that required fields were entered incorrectly. The Caseworker can return to area needing correction.

5a AF Condition 1.

3a.1 Caseworker selects 'Cancel'.

4a.1 System does not delete record.

9a-10a AF Condition 1.

4b.1 Caseworker requests System cancel information.

5b.1 System cancels information and closes page; returns to Placement Requests Details Page.

5 Important and Required Fields

MSS or AF Step	Fields
MSS3 Step 2	<p><u>Placement Request Page</u></p> <p>Child Name The name of the child for which placement is being requested</p> <p>Status The status of the placement request record</p> <p>Request Date The date the placement request record was entered</p> <p>Placement Needed Date The date that placement was needed for the child</p> <p>Estimated Placement End Date The estimated date or amount of time that placement is needed for the child</p> <p>Service Category The service category associated to the placement being requested</p> <p>Service Type The service type associated to the placement being requested</p> <p>Placement preferred with sibling Yes or no answer to the child’s preference to be placed with siblings</p> <p><u>Potential Matches</u></p> <p>Provider Name Name of the provider</p> <p>Placement Request Status The status of the placement request acceptance</p> <p>Rejection Reason The reason the placement request was rejected</p> <p>Rejection Date The date the placement request was rejected</p> <p>Additional Comments Any additional information that would apply to the Placement Request record</p> <p><u>Placement Details</u> Information specific to placement details</p>

Figure 2 – Important and Required Fields

6 Special Requirements

6.1 Current Placement Requests Service Record Rule

Only one current Placement Requests Record can exist per child.

6.2 Initial Save Rule

Upon initial apply or save of the record, the Child Name and Placement preferred with sibling fields will be disabled.

6.3 Service Type Filter Rule

The Service Type(s) will be filtered based on the Placement Services Service Category. Placement Services will pre-fill the Service Category field and will not be worker modifiable.

6.4 Accepted Rules

The system should allow only one Provider per Placement Request record to have a Match Status of 'Accepted'.

6.5 Accepted Notification Rule

Upon save of the Placement Request record the System should send a notification which states "Insert Provider Name/Provider ID has been accepted as a placement match for Insert Child Name in the Insert Case Name/Case ID Case. Please contact your agency placement worker to discuss the opportunity for placement of the child."

6.6 Add Placement Rules

1. The system should allow only one Placement to be completed per child.
2. The system will only allow Providers with a Match Status of 'Accepted' in the Accepted Potential Provider Matches.
3. When a Placement Record has been entered in draft status, the Placement Request record status will be set to 'Placement in Progress'. If the Placement Record is deleted the Placement Request Record Status will be reset to 'Pending'.
4. Completion of the Placement Record will set the Placement Request Record status to 'Placement Completed'.

5. The following fields from the Placement Request Record will pre-fill the Placement Record.

From the Placement Request Page	Will pre-fill the Placement (Services) Page
Service Category	Service Category
Service Type	Service Type
Child's Name	Child's Name
Provider Name	Provider

These fields will not be worker modifiable.

6.7 Link Provider Rules

Although the Service Type field is not required to save the Placement Request record, the Link Provider button will be disabled until a value is selected in the Service Type field.

The System should pre-fill the following information from the Placement Request record into the identified fields of the Provider Match page.

From the Services Page	Will pre-fill the Provider Match Page
Service Category	Service Category
Service Type	Service Type
The Employing Agency Type of the logged on worker	Agency Type
The Employing Agency of the logged on worker	Agency
Child's Age	From Age
Child's Gender	Gender
Child's Language	Language
Child's Race	Corresponding Race Checkboxes
Child's Characteristics	Characteristics to be used in Match
Child's School District	School District

The System will not allow the user to modify the Service Category or Service Type information and will not allow modification of the Child's Age, Gender, Language or Race fields.

6.8 Provider Search and Selection Rules

The System should allow the user to multi-select Providers that meets the following criteria:

1. The Provider Status is 'Active'.

2. The Service Status is 'Active' and the employing agency of the logged in worker is associated to the active service credential record.

6.9 Match Status 'Rejected' Rule

For a placement request record with Match Status of 'Rejected' if the Match status is changed from Rejected (i.e., Accepted or Pending), the Rejection Reason and Rejection Date are cleared and disabled.

6.10 Frozen Fields Rule

Once the Placement Request record has been saved, Child Name, Request Date, Service Category, Service Type, and Placement with Siblings Preferred will become frozen.

6.11 Placement Needed Date Rule

The Placement Needed Date must be equal to or greater than the Request Date.

6.12 Frozen Placement Requests Record Rule

When a user sets the status of the Placement Requests Record to one of following: 'Unable to Place, Request Withdrawn, Request Completed or Created in Error, the information on the Request Information will become frozen. In addition, upon the System setting the status of the Placement Record to 'Placement Completed', all fields will become frozen.

7 Notes, Background Information, User Interface Ideas

Placement Workers will have the security profile which allows all functionality described in this use case with the exception of Add (creation) of Placement Request records. Placement Workers will be able to maintain existing Placement Request records via the Placement Request Log which is discussed in CM09b-Maintain Placement Request Log.

Status

Pending
Placement in Progress
Placement Completed
Request Completed
Request Withdrawn
Unable to Place

Match Status

Pending
Contacted
Accepted
Rejected

Rejection Reason

Provider Rejected after Match Conference
Provider Rejected prior to Match Conference
Provider Rejected due to child refusal
Provider Rejected due to child level of care needs
Provider Rejected due to proximity/transaction
Provider Rejected due to pending/current investigation
Provider Rejected due to Rule Violation investigation
Provider Rejected due to current service status
Placement Request rejected by Provider

Service Types

Family Foster Home
Treatment Foster Home
Medically Fragile Foster Home
Pre-Adoptive Infant Home
Adoptive Home
Kinship Care – Relative
Kinship Care – Non-relative
Parent (ICPC)
Group Home
CRC
Residential Parenting Facility
Certified Emergency Shelter Care Facility - ESC
Licensed Medical/Educational Facility - MEF
Detention Facility – DET
Independent Living - IL

(Each of the above values will have a corresponding value that reflects 'Out-of-State'. For example: Family Foster Home-Out of State.