

Ohio SACWIS Project

Use Case CM41 Record Case Review (CAPMIS)(UC338)

Version 2.2

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May 2, 2005

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Prepared for:



Prepared by:

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Revision Log

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1.3	10/01/2004	A/D/C	Caroline Roy	All	Update in Use Case Session
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<u>2.1</u>	<u>03/09/2005</u>	<u>A/D/C</u>	<u>R. Douglas</u>	<u>All</u>	<u>Tech edit</u>
<u>2.2</u>	<u>05/02/2005</u>	<u>A/D/C</u>	<u>S. Hollingshead</u>	<u>All</u>	<u>Pre JAD version</u>

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1 Description

This is a CRUD (Create, Read, Update, Delete) use case regarding the Case Review (CAPMIS). The case review is a re-examination of safety, risk, emerging danger and a discussion of the impact the provision of services has on the family. The case review is completed at a minimum, every three months based upon whichever of the following activities occurs first 1) Original Court Complaint Date 2) Date of Placement 3) Date of Court Ordered Protective Supervision 4) Date of Agency Worker Signature on Case Plan (for no court orders only). The case review is done in conjunction with the Semiannual Administrative Review (SAR) every six months.

The Case Review must be completed every 90 days and at case closure. The PCSA's are able to review cases utilizing the Case Review tool more frequently if agency practice or case circumstances warrant it.

1.1 Definitions:

Override Approver – Agency employee who approves discretionary overrides.

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
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2 Characteristic Information

Name	CM41 Record Case Review (UC338)
Level	 Business – Case Management
Scope	 - Primary Task
Primary Actor(s)	<u>Caseworker</u> , Worker
Supporting Actor(s)	
Stakeholders and Interests	Child(ren) Family members: Parent/guardian/custodian Guardian ad litem Court appointed special advocate Child's substitute care giver Kin/relative who is providing care for the child The pre-adoptive parent Attorney Court OWF Caseworkers Tribal -Extended family (ICWA) Probation officers Service Providers Private Agencies (PCPA) PCSA ODJFS
Pre-conditions	The Case is open. Case Plan has been completed.
Post-conditions	Case Review is completed.
Trigger(s)	Pending Triggers to be reviewed by Policy concerning the timelines for completion of the Case Review and SAR Case Review Date every 90 days which ever occurs first triggered by Date of agency worker signature on case plan (for voluntary) Original court complaint date Date of Placement Date of Court Ordered Protective Supervision 3. Subsequent Case Reviews In conjunction with the SAR Case Review every 90 days
RFP Requirements Addressed	No Requirements written for this use case.

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Figure 1 – Characteristic Information

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3 Basic Flow

3.1 Usage Examples and Narratives

- Example 1: User needs to navigate Case Review.
- Example 2: User needs to filter list page.
- Example 3: Caseworker needs to add a new Case Review Record.
- Example 4: Caseworker needs to link a Case Plan record to the Case Review Record.
- Example 5: Caseworker needs to edit Case Review information.
- Example 6: User needs to view Case Review information.
- Example 7: Caseworker needs to edit Case Plan Concern Information via the Service Review page.
- Example 8: User needs to view Case Plan Concern Information via the Service Review page.
- Example 9: Caseworker needs to edit Case Service Information.
- Example 10: User needs to view Case Service Information.
- Example 11: Caseworker needs to generate a report from the Case Review.
- Example 12: User needs to view report from the Case Review.
- Example 13: Caseworker needs to route Case Review to supervisor for approval.

3.2 Main Success Scenarios

Scenario 1: Navigate Case Review List Page

1. The Worker requests the System present the Case Review List page for the selected Case.
2. System presents the Case Review List page.
3. The System presents the Case Review list page.
4. Caseworker optionally executes one of Scenarios 2-3 or 5-6. Worker optionally executes Scenario 6.

Scenario 2: Filter List Page

1. Worker enters search/filter criteria.
2. Worker requests System 'Filter.'
3. System presents filtered view of Case Review list.

Scenario 3: Add Case Review Record

***Note: The user can alternate back and forth between the various pages contained within the Case Review record.**

1. Caseworker requests the system Add an initial Case Review record.
2. System presents the Case Review record in edit mode and defaults to Case Review Information page.
3. Caseworker optionally executes Scenario 4.
4. Caseworker optionally enters information.
5. Caseworker optionally requests System display the Safety Review page.
6. System presents the Safety Review page.
7. Caseworker optionally enters information.

- Formatted: Bullets and Numbered List
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Example 12: User needs to view Strengths and Needs Information. ¶
Example 13: Caseworker needs to edit Risk Reassessment Information.¶
Example 14: User needs to view Risk Reassessment Information.¶
- Deleted: 5
- Inserted: 5: Caseworker needs to generate a report from the Case Review Example 1
- Deleted: 6
- Inserted: 6: User needs to view report from the Case Review.¶
Example 1
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- Inserted: 7: Caseworker needs to route Case Review to supervisor for approval.¶
Main Success Scenarios¶
¶
Navigate Case Review List Page¶
¶
The Worker requests the System present the Case Review List page for the selected Case.¶
System presents the Case Review List page.¶
The System presents the Case Review page.¶
Caseworker optionally executes one of Scenarios 2-3 or 5-6. Worker optionally executes Scenario 6. ¶
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8. Caseworker optionally requests System display the Emerging Danger page.
9. System presents the Emerging Danger page.
10. Caseworker optionally enters information.
11. Caseworker optionally requests System display the Case Progress page.
12. System presents the Case Progress page defaulted to the Service Review page.
13. Caseworker optionally executes Scenarios 7-8.
14. Caseworker optionally requests System display the Strengths and Needs page.
15. System presents the Strengths and Needs page.
16. System presents the Strengths and Needs page.
17. Caseworker optionally enters information.
18. Caseworker optionally requests System display the Risk Reassessment page.
19. System presents the Risk Reassessment page defaulted to the Risk Reassessment Scores page.
20. Caseworker optionally enters information.
21. Caseworker optionally requests System display the Policy Overrides page within the Risk Reassessment page.
22. System presents the Policy Overrides page.
23. Caseworker optionally enters information.
24. Caseworker optionally requests the system present the Case Analysis page.
25. The system presents the Case Analysis page.
26. Caseworker optionally enters information.
27. Caseworker optionally executes Scenario 13.
28. Caseworker optionally requests the system 'Save' Case Review record.
29. System validates and saves Case Review record returning to Case Review List.

Scenario 4: Link Case Plan Record to Case Review Record

1. Caseworker requests the system Link Case Plan.
2. System presents the Link Case Plan list page.
3. Caseworker selects appropriate Case Plan Record and requests system link the Plan to the Case Review Record.
4. System returns the Caseworker to the Case Plan Identifying Information page with information from the selected Case Plan prefilled into the Case Review Record.

Scenario 5: Maintain Case Review Record

1. Caseworker requests System 'Edit' selected Case Review record.
2. System presents Case Review record in edit mode and defaults to Case Review Information page.
3. Repeat Steps 4-29 of Scenario 3.

Scenario 6: View Case Review Record

1. Worker requests the system display Case Review record.
2. System presents the Case Review record in view mode and defaults to Case Review Information page.
3. Worker views information.
4. Worker optionally requests System display the Safety Review page.
5. System presents the Safety Review page in view mode.

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<#>Caseworker optionally enters information.¶
Caseworker optionally requests Syst display the
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System presents the
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Caseworker optionally enters information.¶
Caseworker optionally requests Syst display the Risk
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System presents the
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Caseworker optionally enters information.
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6. [Worker views information.](#)
7. [Worker optionally requests System display the Emerging Danger page.](#)
8. [System presents the Emerging Danger page in view mode.](#)
9. [Worker views information.](#)
10. [Worker optionally requests System display the Case Progress page.](#)
11. [System presents the Case Progress page in view mode defaulted to the Service Review page.](#)
12. [Worker optionally executes Scenario 8.](#)
13. [Worker optionally requests System display the Strengths and Needs page.](#)
14. [System presents the Strengths and Needs page in view mode.](#)
15. [Worker views information.](#)
16. [Worker optionally requests System display the Risk Reassessment page.](#)
17. [System presents the Risk Reassessment page in view mode defaulted to the Risk Reassessment Scores page.](#)
18. [Worker views information.](#)
19. [Worker optionally requests System display the Policy Overrides page within the Risk Reassessment page.](#)
20. [System presents the Policy Overrides page in view mode.](#)
21. [Worker views information.](#)
22. [Worker optionally requests the system present the Case Analysis page.](#)
23. [The system presents the Case Analysis page in view mode.](#)
24. [Worker views information.](#)
25. [Worker optionally executes scenario 13.](#)
26. [Worker optionally requests the system 'Close' Case Review record.](#)
27. [System closes Case Review record returning worker to Case Review List.](#)

Scenario 7: Edit Case Plan Concern Information

1. [Caseworker requests system display selected Case Plan Concern record in edit mode.](#)
2. [System presents selected Case Plan Concern detail page in edit mode.](#)
3. [Caseworker optionally updates information.](#)
4. [Caseworker optionally executes scenarios 9 and 10.](#)
5. [Caseworker optionally requests the system save information.](#)
6. [System validates and saves information; returns to Service Review Information page.](#)

Scenario 8: View Case Plan Concern Information

1. [Worker requests system display selected Case Plan Concern record in view mode.](#)
2. [System presents selected Case Plan Concern detail page in view mode.](#)
3. [Worker optionally executes scenario 10.](#)
4. [Worker request System close page.](#)
5. [System closes page and returns worker to the Service Review Information page.](#)

Scenario 9: Edit Case Service Information

1. [Caseworker requests System edit selected Service Information Record.](#)
2. [System presents Service Information page \(CM10- Maintain Case Services\) in edit mode.](#)

Deleted: Worker requests System 'View' selected Case Review record. System presents Case Review record in view mode and defaults to Case Review Information page.¶
Worker optionally views information. Worker optionally executes Scenario 8. Worker optionally requests System display the Emerging Danger page.¶
System presents the Emerging Danger page.¶
Worker optionally enters information. Worker optionally requests System display the Strength/Needs page.¶
System presents the Strength/Needs page.¶
Worker optionally executes Scenario 9, 11, and 12 (*Note: The worker is able to view Approval History in Scenario 12). Caseworker optionally requests System display the Summary page.¶
<#>System presents the Summary page.¶
<#>Worker optionally requests System display the Risk Assessment page.¶
<#>System presents the Risk Assessment page.¶
<#>Worker optionally requests System display the Disposition page.¶
<#>System presents the Disposition page.¶
<#>Worker requests the system 'Close' Case Review record.¶
System closes the Case Review record returning to Case Review List.

Inserted: Worker requests System 'View' selected Case Review record. System presents Case Review record in view mode and defaults to Case Review Information page.¶
Worker optionally views information. Worker optionally executes Scenario 8. Worker optionally requests System display the Emerging Danger page.¶
System presents the Emerging Danger page.¶
Worker optionally enters information. Worker optionally requests System display the Strength/Needs page.¶
System presents the Strength/Needs page.¶
<#>Worker optionally executes Scenario 9, 11, and 12 (*Note: The worker is able to view Approval History in Scenario 12). Caseworker optionally requests System display the Summary page.¶
<#>System presents the Summary page.¶
<#>Worker optionally requests System display the Risk Assessment page.¶
<#>System presents the Risk Assessment page.¶
<#>Worker optionally requests System display the Disposition page.¶
<#>System presents the Disposition page.¶
<#>Worker requests the system 'Close' Case Review record.¶
System closes the Case Review record returning to Case Review List.

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3. Caseworker optionally updates service review information (CM10-Maintain Case Services) and requests system save record.
4. System validates and saves information; returns to Case Plan Concern detail page.

Scenario 10: View Case Service Information

1. Worker requests System display selected Service Information Record.
2. System presents Service Information page (CM10- Maintain Case Services) in view mode.
3. Caseworker views Service Information (CM10-Maintain Case Services) and requests system close record.
4. System closes page and returns worker to Case Plan Concern detail page.

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Scenario 11: Generate Report

1. Caseworker selects Report.
2. Caseworker Assessor requests System 'Generate' report for selected Case Review record.
3. System presents preview of Report.
4. Caseworker optionally views report.
5. Caseworker optionally requests System 'Print' report.
6. System generates report.
7. Caseworker optionally requests System close page.
8. System saves report and returns User to Case Review List page.

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<#>Edit Risk Reassessment
Information|
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Scenario 12: View Report

1. Worker selects Report.
2. Worker requests System 'View' report for selected Case Plan record.
3. System presents preview of Report.
4. Worker optionally views report.
5. Worker requests System 'Print' report.
6. System produces report.

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Scenario 13: Route/Approve Case Review Record – View Approval History

1. User requests System present 'Approval' page.
2. System verifies record is in edit mode.
3. System validates Case Review record.
4. System saves Case Review record.
5. System presents Approval page (view mode for Worker). (See CF32-Process Approvals).
6. User enters information. (Worker views information).
7. User requests System return to Case Review Record.
8. System returns to Case Review record.

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4 Alternate Flows

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3a-5a AF Condition 1.
29a.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.

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3b-5b AF Condition 2.
28b.1 Caseworker requests System apply information.
29b.1 System verifies and saves information and does not close page.

3c-5c AF Condition 3.
28c.1 Caseworker requests System cancel information.
29c.1 System cancels information and returns Caseworker to Case Review List page.

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7a AF Condition 1.
5a.1 Caseworker requests System cancel information.
6a.1 System cancels information and returns Caseworker to the Service Review page.

9a AF Condition 1.
3a.1 Caseworker requests System cancel information.
4a.1 System cancels information and returns Caseworker to the Case Plan Concern Detail page.

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13a AF Condition 1.
2a.1 System verifies that record is in view mode; skips to Step 5.
3a.1 System determines that the data validation produced errors and presents Validation page. Remaining steps cannot be performed until user corrects identified errors.

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Important and Required Fields

MSS or AF Step	Fields
MSS 1 Step 8 Reason for Completing the Case Review	Pick list/Checkbox: <ul style="list-style-type: none"> Three Month Case Review Semiannual Administrative Review Case Closure Other (textbox)
MSS 1 Step 11 Section 2 Safety Assessment 2A: Safety Review	Case Circumstances <ul style="list-style-type: none"> If a safety threat was not identified If a safety threat is not active but has been active at any time since the last assessment was completed If a safety threat is active now
MSS 1 Step 12 2A 3: A safety threat is active now	Section 2A 3a Describe the active safety threat(s), identify which children are affected, and which caregivers or other adults are involved. Describe any progress toward alleviating the safety threat(s). (textbox)
MSS 1 Step 13 2A 3: A safety threat is active now	Section 2A 3b Describe the present protective capacities of each caregiver and highlight significant changes that may have occurred since the last assessment of safety was completed. (textbox)
MSS 1 Step 14 2A 3: A safety threat is active now	Section 2A 3c Describe the present vulnerability of each child and highlight significant changes that may have occurred since the last assessment of safety was completed(textbox)
MSS 1 Step 17 3B: Safety Response Review	<ul style="list-style-type: none"> Maintain: If the safety response has not been changed since last assessment of safety. OR Safety responses have been implemented and need to continue. Create: If a new safety response is needed Modify: If a revised safety response is needed. Discontinue: If a safety response is no longer needed. Previously Discontinued: If a safety threat is not currently active but has been active since the last assessment of safety and the safety response was discontinued.
MSS 1 Step 18 Emerging Danger Re-Assessment Section C, Item 1A	Was emerging danger identified in the previous assessment of emerging danger? Yes/No Checkbox
MSS 1 Step 20 Emerging Danger Re-Assessment Section C, Item 2A	Has new emerging danger that has been identified during this assessment period under review? Yes/No (Checkbox)
MSS 1 Step 21 AF 18b Step 2 Emerging Danger Re-Assessment Section C, Item 1B Section C, Item 2B Same wording for each section	Check each (1 or more) emerging danger characteristics identified during this period under review (check all that apply) (current assessment period) (Check Boxes) <ul style="list-style-type: none"> Decrease in caretaker's protective capacities Increase in child vulnerability, including provocative and/or unruly/delinquents behaviors Escalation of threats of harm as indicated in the previous completed assessment - (If escalation is selected the worker one or more threats of harm)

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Example: Completion of Three Month (90 days) Review: Suzie, who is the worker assigned to the Smith case, realizes that three months have pass since she completed the last Case Re for the Smith case. Suzie accesses th Smith case in the system and takes t appropriate steps for creating a new Review for that family.¶

Example: Completion of the Case R prior to SAR: Suzie, who is the wor assigned to the Smith case, determin that it is time to complete a Semi-annual Administrative Review (SAR) for th Smith case. This is because six mon has passed since the last SAR was completed. Before completing a new SAR, Suzie will complete a new Ca Review since a new Case Review is required when a new SAR is to be completed. Suzie accesses the Smith in the system and takes the appropri steps for creating a new Case Review that family.¶

Example: Closure of the Case Resul New Case Review: Suzie, who is th worker assigned to the Smith case, I been working with the Smith's for 3 to resolve the safety concerns for the Smith children. The PCSA will no l be providing services to the Smith fi so the time has come to close the Sn case. Before doing so, Suzie must complete a new Case Review. Suzie accesses the Smith case in the syste takes the appropriate steps for creati new Case Review for that family.¶

Example: Completion of the case re at any other time other than the 90 d required timeline: Suzie, the worker assigned to the Smith case believes review of the case in necessary prior the 90 day case review timeline.¶

<#>Usage Examples and Narratives¶

Scenario 1: Create a Case Review: Safety Threat is Active Now (Section C, Item 3) ¶

<#>Example: Threat is currently act child is in out of home care setting c a safety threat: (Initial case review d without SAR) ¶

Scenario 2: Safety Re-Assessment (Section 2): Child is in PC (perman custody) or PPLA (permanent plann living arrangement). ¶

Scenario 3: Read (view) a Case Re <#>Example: Suzie, who is the wor assigned to the Smith case, in prepar for a family visit, Suzie wants to r(

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Use Case CM41 - Record Case Review (CAPMIS) (UC338)

MSS or AF Step	Fields
	<ul style="list-style-type: none"> Increasing frequency and/or ongoing Increase seriousness or intensity Increasing effect on child (level of harm) Increasing duration Increasing unwillingness to follow case plan and/or allow access to child
MSS 1 Step 22 Emerging Danger Re-Assessment Section C, Item 1B	Describe the emerging danger and how it was, or will be, addressed. (textbox)
MSS 1 Step 23 Emerging Danger Re-Assessment Section C, Item 1C Section C, Item 2C Same wording for each section	Is this emerging danger is still active? Yes/No Checkbox
MSS 1 Step 24 Family Perception Section 2D	Describe how the family and other individuals involved in the case view their own strengths and problem areas. (Textbox)
MSS 1 Step 28 Section 3 Case Progress Review Services Review (3A #1) Service Identification	Textbox <ul style="list-style-type: none"> Identify all services provided/planned to address this concern.
MSS 1 Step 29 Section 3 Case Progress Review Services Review (3A) Service recommendation for every service linked to that concern	Checkbox and textbox <ul style="list-style-type: none"> Continue Modify Terminate
MSS 1 Step 33 Section 3 Case Progress Review Services Review (3A #2) Impact and Barriers	Textbox <ul style="list-style-type: none"> Discuss the impact toward addressing safety, emerging danger, risk, permanency and/or child well-being issues in detail. If applicable, include any existing barriers to services.
MSS 1 Step 34 Section 3 Case Progress Review Services Review (3A) Level of Progress Toward Addressing Concern	Checkbox <ul style="list-style-type: none"> Significant Progress Some Progress Insufficient Progress
MSS 1 Step 38 Case Review 3 B Strengths and Needs Update	Category and Assessment Element Check box Yes/No per Assessment Element): Is this element currently contributing to risk for anyone in the family? Child Functioning <ul style="list-style-type: none"> Self Protection

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Use Case CM41 - Record Case Review (CAPMIS) (UC338)

MSS or AF Step	Fields
	<ul style="list-style-type: none"> • Physical/Cognitive/Social Development • Emotional/Behavioral Functioning <p>Adult Functioning</p> <ul style="list-style-type: none"> • Cognitive Abilities • Physical Health • Emotional/Mental Health Functioning • Domestic Relations (Domestic Violence) • Substance Use • Response to Stressors • Parenting Practices <p>Family Functioning</p> <ul style="list-style-type: none"> • Family Roles, Interactions, and Relationships • Resource Management and Household Maintenance • Extended Family, Social and Community Connectedness <p>Historical</p> <ul style="list-style-type: none"> • Caretaker's Victimization of Other Children • Caretaker's Abuse/Neglect as a Child • Impact of Past Services
<p>MSS 1 Step 39 Case Review 3 B #1 Strengths and Needs Update</p>	<p>Textbox</p> <ul style="list-style-type: none"> • Consider the elements above and the impact of provided services as discussed in Section 3A. Describe what family dynamics continue to create or increase the likelihood of maltreatment to a child. For children in PC, describe what child characteristics continue to be identified as a need.
<p>MSS 1 Step 40 Case Review 3 B #2 Strengths and Needs Update</p>	<p>Textbox</p> <ul style="list-style-type: none"> • Describe the most significant new information regarding underlying conditions, protective capacities, child vulnerability and child harm, if applicable, and new life events which occurred since the last assessment or review.
<p>MSS 1 Step 41 Case Review 3 B #3 Strengths and Needs Update</p>	<p>Textbox</p> <ul style="list-style-type: none"> • Summarize the key case activities, including the frequency and type of agency visits with parent or caretaker and child, which have occurred since the last assessment or review.
<p>MSS 1 Step 42 Case Review 3 B #4 Strengths and Needs Update</p>	<p>Textbox</p> <ul style="list-style-type: none"> • If applicable, describe the quality of visitation between family and child in placement which has occurred since the last assessment or review.
<p>MSS 1 Step 45</p>	<p>Risk Reassessment Scale of Abuse/Neglect</p> <p>R1: Number of Prior Reports (Do not count most recent report)</p> <ol style="list-style-type: none"> a. None value = 0 b. One or two value = 1 c. Three or more value =2 <p>R2 Number of Children in the Home (at time of most recent report)</p> <ol style="list-style-type: none"> a. Two or fewer value = 0 b. Three or more value = 1 <p>R3 Number of Adults in the Home (at time of most recent report)</p> <ol style="list-style-type: none"> a. Two or more value = 0

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Use Case CM41 - Record Case Review (CAPMIS) (UC338)

MSS or AF Step	Fields
	<p>b. One/none value = 1</p> <p>R4 Current Age of Primary Caregiver</p> <p>a. 28 or older value = 0</p> <p>b. 27 or younger value = 1</p> <p>R5 Either Caregiver Currently has Major Parenting Skills Problem (excessive discipline, over-controlling, other major problem)</p> <p>a. No value = 0</p> <p>b. Yes value = 2</p> <p>R6 Either Caregiver is Currently involved in Harmful Relationships</p> <p>a. No value = 0</p> <p>b. Yes (some problem, major problem and/or domestic violence) value = 2</p> <p>R7 Either Caregiver has a Current Substance Abuse Problem</p> <p>a. No value = 0</p> <p>b. Yes (alcohol and/or drug) value = 2</p> <p>c. Yes (refuses treatment) value = 4</p> <p>R8 New Complaints of Abuse/Neglect Since Last Assessment</p> <p>a. No or complaint was unsubstantiated or screened out value = 0</p> <p>b. Yes or complaint was substantiated or indicated value = 3</p> <p>R9 Primary Caregiver(s) Progress Toward Case Plan Goals (since last assessment)</p> <p>a. Successfully completed all programs recommended or actively participating in programs; pursuing case plan objectives; usually demonstrates desired behavior value = 0</p> <p>b. Moderate participation in pursuing case plan objectives; occasionally demonstrates desired behavior value = 1</p> <p>c. Minimal participation or refuses involvement; rarely or never demonstrates desired behavior value = 3</p> <p>R10 Secondary Caregiver's Progress toward Case Plan Goals (since the last assessment)</p> <p>a. Not Applicable, only one caregiver in home value = 0</p> <p>b. Successfully completed all programs recommended or actively participating in programs value = 0</p> <p>c. Moderate participation in pursuing case plan objectives; occasionally demonstrates desired behavior value = 1</p> <p>d. Minimal participation or refuses involvement; rarely or never demonstrates desired behavior value = 3</p>
<p>MSS 1 Step 46 Risk Reassessment Scale of Abuse/Neglect Actual Risk Level</p>	<p>Score (Checkbox)</p> <p><input checked="" type="checkbox"/> 0-3</p> <p><input checked="" type="checkbox"/> 4-7</p> <p><input checked="" type="checkbox"/> 8-12</p> <p><input checked="" type="checkbox"/> 13-22</p> <p>Risk Level (Checkbox)</p> <p><input checked="" type="checkbox"/> Low (close unless an override is used)</p> <p><input checked="" type="checkbox"/> Moderate</p> <p><input checked="" type="checkbox"/> High</p> <p><input checked="" type="checkbox"/> Intensive</p>

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Use Case CM41 - Record Case Review (CAPMIS) (UC338)

MSS or AF Step	Fields
MSS 1 Step 48 Policy Override Case Review Risk Re-Assessment Section 3C.	<p>Policy Overrides</p> <ol style="list-style-type: none"> 1. An in-home or out-of-home safety plan is still active 2. Emerging Danger has been identified 3. Non-accidental physical injury to any age child requiring medical treatment 4. Death (previous or current) of a caregiver's child or any other child in their care as a result of abuse or neglect 5. Sexual abuse cases where the alleged perpetrator is likely to have immediate access to the child victim 6. Cases with non-accidental physical injury to an infant 7. Positive tox screen of child at birth.
MSS 1 Step 50	<p>Override/final risk level</p> <ul style="list-style-type: none"> • low • moderate • high • intensive
MSS 1 Step 53 Continue Agency Involvement – Family in Need of Agency Services Case Status 3D	<p>Case Status – Check all that apply Continue Agency Involvement – Family in Need of Agency Services</p> <ul style="list-style-type: none"> • In-Home Supportive Services • Protective Supervision • Out-of-Home Placement
MSS 1 Step 55 AAF 4 Terminate Agency Services Case Status 3D	<p>Terminate Agency Services</p> <ul style="list-style-type: none"> • Family No Longer in Need of Agency Services <ul style="list-style-type: none"> ○ Low Risk Case and No Safety Issues Identified ○ Legal Custody to 3rd Party ○ CPS Services Not Needed- Referral to Other Community Services • Services Terminated Against Agency Recommendation <ul style="list-style-type: none"> ○ Client Moved Out of County, Referral Made • Family Refused Services and/or Court Petition Denied <ul style="list-style-type: none"> ○ Unsatisfactory Family Response – Court Not Feasible ○ Location of Clients Unknown
AF 11b Step 4 Safety Re-Assessment page (Section 2) Safety Review (2A 2a) Safety Threat is not currently active but had been active at any time since last assessment of safety was completed.	<p>Describe the safety threat and then summarize the information that demonstrates safety threat resolution, sufficient safety threat reduction and/or adequate protective capacities necessary to protect the child(ren) from serious harm.</p>
AF 18b Step 3	<p>Describe the emerging danger and how it was addressed.</p>
Case Review Reports	<p><u>Reports</u></p> <ul style="list-style-type: none"> • Standard Header info for Case Review: Case Name; Case Number; Agency worker; • Review Date: every 90 days – triggered by <ul style="list-style-type: none"> ○ Completion Date: Supervisor signature date

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Use Case CM41 - Record Case Review (CAPMIS) (UC338)

MSS or AF Step	Fields
	<ul style="list-style-type: none"> ○ Date of agency worker signature on case plan (for voluntary) ○ Original court complaint date ○ Date of placement ○ Date of court ordered protective supervision ● Last Review Date: (Date of Previous Case Review) ● Date of Report (used only if Case Review is being conducted for the ____ report) ● By child Permanency Goal ● Generate a "Case Plan" receipt document <p><u>Subsequent Reports</u></p> <ul style="list-style-type: none"> ● New report within 4 working days of a previous report ● SA due within 4 working days – can include both reports on one SA within the 4 working days from 1st report. ● New report on day 5(or later) of a prior report ● New SA <p>Report: by legal status and removal reason due to safety threat.</p>
MSS 1 Step 8 Reason for Completing the Case Review	<p>Pick list/Checkbox:</p> <ul style="list-style-type: none"> ● Three Month Case Review ● Semiannual Administrative Review ● Case Closure ● Other (textbox)
MSS 1 Step 11 Section 2 Safety Assessment 2A: Safety Review	<p>Case Circumstances</p> <ul style="list-style-type: none"> ● If a safety threat was not identified ● If a safety threat is not active but has been active at any time since the last assessment was completed ● If a safety threat is active now
MSS 1 Step 12 2A 3: A safety threat is active now	<p>Section 2A 3a</p> <ul style="list-style-type: none"> ● Describe the active safety threat(s), identify which children are affected, and which caregivers or other adults are involved. ● Describe any progress toward alleviating the safety threat(s). (textbox)
MSS 1 Step 13 2A 3: A safety threat is active now	<p>Section 2A 3b</p> <ul style="list-style-type: none"> ● Describe the present protective capacities of each caregiver and highlight significant changes that may have occurred since the last assessment of safety was completed. (textbox)
MSS 1 Step 14 2A 3: A safety threat is active now	<p>Section 2A 3c</p> <ul style="list-style-type: none"> ● Describe the present vulnerability of each child and highlight significant changes that may have occurred since the last assessment of safety was completed(textbox)
MSS 1 Step 17 3B: Safety Response Review	<ul style="list-style-type: none"> ● Maintain: If the safety response has not been changed since last assessment of safety. OR Safety responses have been implemented and need to continue. ● Create: If a new safety response is needed ● Modify: If a revised safety response is needed. ● Discontinue: If a safety response is no longer needed. ● Previously Discontinue: If a safety threat is not currently active but has been active since the last assessment of

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Use Case CM41 - Record Case Review (CAPMIS) (UC338)

MSS or AF Step	Fields
	safety and the safety response was discontinued.
MSS 1 Step 18 Emerging Danger Re-Assessment Section C, Item 1A	Was emerging danger identified in the previous assessment of emerging danger? Yes/No Checkbox
MSS 1 Step 20 Emerging Danger Re-Assessment Section C, Item 2A	Has new emerging danger that has been identified during this assessment period under review? Yes/No (Checkbox)
MSS 1 Step 21 AF 18b Step 2 Emerging Danger Re-Assessment Section C, Item 1B Section C, Item 2B <i>Same wording for each section</i>	Check each (1 or more) emerging danger characteristics identified during this period under review (check all that apply) (current assessment period) (Check Boxes) <ul style="list-style-type: none"> Decrease in caretaker's protective capacities Increase in child vulnerability, including provocative and/or unruly/delinquents behaviors Escalation of threats of harm as indicated in the previous completed assessment - (If escalation is selected the worker one or more threats of harm) <ul style="list-style-type: none"> Increasing frequency and/or ongoing Increase seriousness or intensity Increasing effect on child (level of harm) Increasing duration Increasing unwillingness to follow case plan and/or allow access to child
MSS 1 Step 22 Emerging Danger Re-Assessment Section C, Item 1B	Describe the emerging danger and how it was, or will be, addressed. (textbox)
MSS 1 Step 23 Emerging Danger Re-Assessment Section C, Item 1C Section C, Item 2C <i>Same wording for each section</i>	Is this emerging danger is still active? Yes/No Checkbox
MSS 1 Step 24 Family Perception Section 2D	Describe how the family and other individuals involved in the case view their own strengths and problem areas. (Textbox)
MSS 1 Step 28 Section 3 Case Progress Review Services Review (3A #1) Service Identification	Textbox <ul style="list-style-type: none"> Identify all services provided/planned to address this concern.
MSS 1 Step 29 Section 3 Case Progress Review Services Review (3A) Service recommendation for every service linked to that concern	Checkbox and textbox <ul style="list-style-type: none"> Continue Modify Terminate
MSS 1 Step 33	Textbox

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Use Case CM41 - Record Case Review (CAPMIS) (UC338)

MSS or AF Step	Fields
Section 3 Case Progress Review Services Review (3A #2) Impact and Barriers	<ul style="list-style-type: none"> Discuss the impact toward addressing safety, emerging danger, risk, permanency and/or child well-being issues in detail. If applicable, include any existing barriers to services.
MSS 1 Step 34 Section 3 Case Progress Review Services Review (3A) Level of Progress Toward Addressing Concern	Checkbox <ul style="list-style-type: none"> Significant Progress Some Progress Insufficient Progress
MSS 1 Step 38 Case Review 3 B Strengths and Needs Update	Category and Assessment Element Check box Yes/No per Assessment Element): Is this element currently contributing to risk for anyone in the family? <u>Child Functioning</u> <ul style="list-style-type: none"> Self Protection Physical/Cognitive/Social Development Emotional/Behavioral Functioning <u>Adult Functioning</u> <ul style="list-style-type: none"> Cognitive Abilities Physical Health Emotional/Mental Health Functioning Domestic Relations (Domestic Violence) Substance Use Response to Stressors Parenting Practices <u>Family Functioning</u> <ul style="list-style-type: none"> Family Roles, Interactions, and Relationships Resource Management and Household Maintenance Extended Family. Social and Community Connectedness <u>Historical</u> <ul style="list-style-type: none"> Caretaker's Victimization of Other Children Caretaker's Abuse/Neglect as a Child Impact of Past Services
MSS 1 Step 39 Case Review 3 B #1 Strengths and Needs Update	Textbox <ul style="list-style-type: none"> Consider the elements above and the impact of provided services as discussed in Section 3A. Describe what family dynamics continue to create or increase the likelihood of maltreatment to a child. For children in PC, describe what child characteristics continue to be identified as a need.
MSS 1 Step 40 Case Review 3 B #2 Strengths and Needs Update	Textbox <ul style="list-style-type: none"> Describe the most significant new information regarding underlying conditions, protective capacities, child vulnerability and child harm, if applicable, and new life events which occurred since the last assessment or review.
MSS 1 Step 41 Case Review 3 B #3 Strengths and Needs Update	Textbox <ul style="list-style-type: none"> Summarize the key case activities, including the frequency and type of agency visits with parent or caretaker and child, which have occurred since the last assessment or review.

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Use Case CM41 - Record Case Review (CAPMIS) (UC338)

MSS or AF Step	Fields
MSS 1 Step 42 Case Review 3 B #4 Strengths and Needs Update	Textbox <ul style="list-style-type: none"> • If applicable, describe the quality of visitation between family and child in placement which has occurred since the last assessment or review.
MSS 1 Step 45	Risk Reassessment Scale of Abuse/Neglect R1: Number of Prior Reports (Do not count most recent report) <ul style="list-style-type: none"> a. None value = 0 b. One or two value = 1 c. Three or more value = 2 R2 Number of Children in the Home (at time of most recent report) <ul style="list-style-type: none"> a. Two or fewer value = 0 b. Three or more value = 1 R3 Number of Adults in the Home (at time of most recent report) <ul style="list-style-type: none"> a. Two or more value = 0 b. One/none value = 1 R4 Current Age of Primary Caregiver <ul style="list-style-type: none"> a. 28 or older value = 0 b. 27 or younger value = 1 R5 Either Caregiver Currently has Major Parenting Skills Problem (excessive discipline, over-controlling, other major problem) <ul style="list-style-type: none"> a. No value = 0 b. Yes value = 2 R6 Either Caregiver is Currently involved in Harmful Relationships <ul style="list-style-type: none"> a. No value = 0 b. Yes (some problem, major problem and/or domestic violence) value = 2 R7 Either Caregiver has a Current Substance Abuse Problem <ul style="list-style-type: none"> a. No value = 0 b. Yes (alcohol and/or drug) value = 2 c. Yes (refuses treatment) value = 4 R8 New Complaints of Abuse/Neglect Since Last Assessment <ul style="list-style-type: none"> a. No or complaint was unsubstantiated or screened out value = 0 b. Yes or complaint was substantiated or indicated value = 3 R9 Primary Caregiver(s) Progress Toward Case Plan Goals (since last assessment) <ul style="list-style-type: none"> a. Successfully completed all programs recommended or actively participating in programs; pursuing case plan objectives; usually demonstrates desired behavior value = 0 b. Moderate participation in pursuing case plan objectives; occasionally demonstrates desired behavior value = 1 c. Minimal participation or refuses involvement; rarely or never demonstrates desired behavior value = 3 R10 Secondary Caregiver's Progress toward Case Plan Goals (since the last assessment) <ul style="list-style-type: none"> a. Not Applicable, only one caregiver in home value = 0 b. Successfully completed all programs recommended or actively participating in programs value = 0 c. Moderate participation in pursuing case plan objectives; occasionally demonstrates desired behavior value = 1

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Use Case CM41 - Record Case Review (CAPMIS) (UC338)

MSS or AF Step	Fields
	d. Minimal participation or refuses involvement; rarely or never demonstrates desired behavior value = 3
MSS 1 Step 46 Risk Reassessment Scale of Abuse/Neglect Actual Risk Level	Score (Checkbox) <input checked="" type="checkbox"/> 0-3 <input checked="" type="checkbox"/> 4-7 <input checked="" type="checkbox"/> 8-12 <input checked="" type="checkbox"/> 13-22 Risk Level (Checkbox) <input checked="" type="checkbox"/> Low (close unless an override is used) <input checked="" type="checkbox"/> Moderate <input checked="" type="checkbox"/> High <input checked="" type="checkbox"/> Intensive
MSS 1 Step 48 Policy Override Case Review Risk Re-Assessment Section 3C.	<u>Policy Overrides</u> 1. An in-home or out-of-home safety plan is still active 2. Emerging Danger has been identified 3. Non-accidental physical injury to any age child requiring medical treatment 4. Death (previous or current) of a caregiver's child or any other child in their care as a result of abuse or neglect 5. Sexual abuse cases where the alleged perpetrator is likely to have immediate access to the child victim 6. Cases with non-accidental physical injury to an infant 7. Positive tox screen of child at birth.
MSS 1 Step 50	<u>Override/final risk level</u> <ul style="list-style-type: none"> • low • moderate • high • intensive
MSS 1 Step 53 Continue Agency Involvement – Family in Need of Agency Services Case Status 3D	Case Status – Check all that apply <u>Continue Agency Involvement – Family in Need of Agency Services</u> <ul style="list-style-type: none"> • In-Home Supportive Services • Protective Supervision • Out-of-Home Placement
MSS 1 Step 55 AAF 4 Terminate Agency Services Case Status 3D	<u>Terminate Agency Services</u> <ul style="list-style-type: none"> • Family No Longer in Need of Agency Services <ul style="list-style-type: none"> ○ Low Risk Case and No Safety Issues Identified ○ Legal Custody to 3rd Party ○ CPS Services Not Needed- Referral to Other Community Services • Services Terminated Against Agency Recommendation <ul style="list-style-type: none"> ○ Client Moved Out of County, Referral Made • Family Refused Services and/or Court Petition Denied <ul style="list-style-type: none"> ○ Unsatisfactory Family Response – Court Not Feasible ○ Location of Clients Unknown
AF 11b Step 4 Safety Re-Assessment page (Section 2)	Describe the safety threat and then summarize the information that demonstrates safety threat resolution, sufficient safety threat reduction and/or adequate protective capacities necessary to

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Use Case CM41 - Record Case Review (CAPMIS) (UC338)

MSS or AF Step	Fields
Safety Review (2A 2a) Safety Threat is not currently active but had been active at any time since last assessment of safety was completed.	protect the child(ren) from serious harm.
AF 18b Step 3	Describe the emerging danger and how it was addressed.
Case Review Reports	<p><u>Reports</u></p> <ul style="list-style-type: none"> • Standard Header info for Case Review: Case Name; Case Number; Agency worker; • Review Date: every 90 days – triggered by <ul style="list-style-type: none"> ○ Completion Date: Supervisor signature date ○ Date of agency worker signature on case plan (for voluntary) ○ Original court complaint date ○ Date of placement ○ Date of court ordered protective supervision • Last Review Date: (Date of Previous Case Review) • Date of Report (used only if Case Review is being conducted for the ____ report) • By child Permanency Goal • Generate a “Case Plan” receipt document <p><u>Subsequent Reports</u></p> <ul style="list-style-type: none"> • New report within 4 working days of a previous report <ul style="list-style-type: none"> ○ SA due within 4 working days – can include both reports on one SA within the 4 working days from 1st report. • New report on day 5(or later) of a prior report <ul style="list-style-type: none"> ○ New SA <p>Report: by legal status and removal reason due to safety threat.</p>

Figure 2 - Important and Required Fields

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6 Special Requirements

6.1 Link Case Plan Rule

The case plan list will populate with the most current approved plan defaulting as the selected plan.

Only one case plan can be linked to a case review record.

Only case plans with the status of approved, can be linked to a case review record.

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Inserted: **Link Case Plan Rule**
The case plan list will populate with most current approved plan defaulting as the selected plan. ¶
Only one case plan can be linked to case review record.¶
Only case plans with the status of approved, can be linked to a case review record. ¶

6.2 Case Review Record Rule

A new case review record cannot be created if there is another case plan associated with the case in an 'In Progress' status.

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6.3 Case Plan Amendment Question Rule

If the answer to the question 'Will the case plan be amended as a result of this review?' is answered 'Yes,' the system will create a new amended case plan in 'In Progress' status.

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6.4 Case Plan Concern Service List Rule

If service records associated with a Case Plan concern share common Service Category/Type, Effective Date, Status, Provider Name, and Service Begin Date, the individual service records should be combined into one record on the Case Plan Concern page.

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6.5 Edit Case Review Rule

Only Case Reviews with a Status of 'In Progress' can be edited by the Caseworker. Supervisors (Authorized Approvers) will be able to edit the record upon receipt of the routed record. Once Final Approval has been applied to the record, all information within the Case Review will be frozen from edit capability.

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6.6 Case Review Tickler

The System should display the following information in the Tickler Summary:

Case ID – Case Name – Tickler Name – Due Date – Days until (or past)

The tickler will be created, escalated and deleted as identified in the table.

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Tickler Name	Created	Deleted	Date Due	Start Date = Assigned Caseworker	First Escalation = Supervisor	Second Escalation = Supervisor's Supervisor
Case Plan Review	When the prior Case Review is completed and approved.	When the new Case Review is completed and approved.	90 days after the approved date of the Case Review	30 Days before Date Due	15 days before Date Due	Same as Date Due

6.7 Agency Names Rule

In the Agency field of the Filter Criteria, the System will only display those agency names for which an employing worker has been responsible for creating a case review.

6.8 Case Review List Page Rule

The System will always display the most current case reviews per agency displaying the records in order of Approval Date (Descending) and will default the Agency Field to the employing agency of the logged in worker.

6.9

- The system must automatically create an entry in the case activity log of the Case Review indicating the completion based on the completion triggers outlined in use case. (Includes: Post Family Assessment Investigation, Specialized Assessment, Independent Living Plan, Supplemental Concurrent Plan, Case Plan, Safety Plan, Safety Assessment, Family Assessment, SAR, Reunification Assessment, Case Review, Case Disposition)
- Business Rule: The most recent assessment of safety is taken from either safety assessment or family assessment or case review (the most current one within current episode)
- The system needs to be cued to understand that the safety plan was in effect because of court orders, in record removal information CM07 Record Removal Information – looking for pick list items that relate to safety threat.
- System must identify children in those legal status or authorize service for a placement that has those removal reasons attached to them as having an active safety plan.
- Business Rule: The system auto fills the start date of the service provided in response to the concern from the most recent case plan or amended case plan. CM05 Maintain Case Plan (UC96)

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A new case review record cannot be created if there is another case plan associated with the case in an In Progress status. ¶

<#>IF the answer to the question 'V the case plan be amended as a result this review?' is answered 'Yes,' the system will create a new amended case plan in 'In Progress' status. ¶

<#>Case Plan Concern Service List If service records associated with a Case Plan concern share common Service Category/Type, Effective Date, Start Provider Name, and Service Begin Date the individual service records should be combined into one record on the Case Plan Concern page. ¶

<#>¶

<#>A Case Review is done every 90 days to review case status. It is based on specific triggers and can not be adjusted to fall in with SAR date. The system track when the Case Review is due. Triggers (which ever comes first):

Completion Date and Supervisor signature date, Date of agency work signature on case plan (for voluntary Original court complaint date, Date Placement, Date of Court Ordered Protective Supervision. Subsequent Reviews: No necessarily done with SAR as the Case Review date is driven for the 90 day review cycle, the above triggers apply. Policy will be reviewed concerning the above rule as it was suggested to make the Case Review in sync with the SAR.¶

<#>The review of services contained within the case review tool could present an amendment to the case plan.¶

<#>The system must maintain all the Case Review history per child. ¶

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A new case review record cannot be created if there is another case plan associated with the case in an In Progress status. ¶

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7 Notes, Background Information, User Interface Ideas

Requirements allocated to this common use case	
	<u>Primary Responsibility</u>
New Requirement 11/05/04	The system must 'consider' (further define consider), placement services as a safety response (CA/N, reports resulting in custody (as opposed to placement services non-paid placement services –agency facilitated placement – legally authorized)

Figure 3 - Requirements Table

Case Review Type:
3 Month Case Review
Semiannual Administrative Review
Case Closure
Other

Case Circumstances:
A safety threat is not currently active.
A safety threat has been active since last safety assessment.
A safety threat is active now.

Progress Toward Addressing Concern:
Significant Progress
Some Progress
Insufficient Progress

Select Override/Final Risk Level:
Low
Moderate
High
Intensive

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Example: Completion of the case review at any other time other than the 90 day required timeline: Suzie, the worker assigned to the Smith case believes that review of the case is necessary prior to the 90 day case review timeline.

Usage Examples and Narratives

Scenario 1: Create a Case Review: Safety Threat is Active Now (Section 2A, Item 3)

Example: Threat is currently active or child is in out of home care setting due to a safety threat: (Initial case review done without SAR)

Scenario 2: Safety Re-Assessment (Section 2): Child is in PC (permanent custody) or PPLA (permanent planned living arrangement).

Scenario 3: Read (view) a Case Review

Example: Suzie, who is the worker assigned to the Smith case, in preparing for a family visit, Suzie wants to review the most recent case review created on the family.

Scenario 4: Update a Case Review (prior to supervisory approval)

Example: Suzie, who is the worker assigned to the Smith case, received a call from the mother and who contact the worker the next day to clarify some comments that were made during the visit. Based on this information, Suzie determines that she needs update the Case Review she completed the day before.

Scenario 5: Delete a Case Review (prior to supervisory approval)

Example: Suzie, the worker assigned to the Smith case, realized that the Case Review she completed yesterday for the Smith family was completed in error. Suzie has not received her supervisor's approval on the Case Review. Suzie deletes the Case Review.

Scenario 6: Delete a Case Review (after supervisory approval)

Example: Suzie, the worker assigned to the Smith case, desires to delete the Case Review after supervisory approval and create a new Case Review. Suzie is not able to delete the approved Case Review.

Main Success Scenarios

Scenario 1: Create a Case Review: Safety Threat is Active Now (Section 2A, Item 3)

Example: Threat is currently active or child is in out of home care setting due to a safety threat: (Initial case review done without SAR)

The worker completes case review for the child(ren) in the family where safety threat has been identified, and emerging dangers has been identified in the last three months. The worker documents the progress toward alleviating safety threats previously identified and modifies the Safety Plan. An initial risk assessment has been completed and the worker completes a risk re-assessment. Maintain, Create or Modify are the only Safety Response selections a worker can make (can not choose previously discontinued, discontinued). If the worker selects Create or Modify system, a dialog box displays instructing the worker to modify or create a safety plan. When Modify or Create is selected, an email notification is sent to supervisor when the worker selects create or modify safety plan in the case review informing them of such.

Maintain Safety Response: Based on the current safety review, the safety response(s) has/have not changed since the last assessment of safety.

No Previous Emerging Danger

New Emerging Danger Identified during this assessment period

Emerging Danger Still Active

Risk Re-Assessment

The worker accesses their workload which displays case assignments. Find a Workload (UC)

The worker selects the case.

The worker accesses the Case Review page of the system.

The worker selects the option to create a Case Review for the case.

The system displays the new Case Review.

The system displays a list of the approved Case Plan(s).

The worker selects the appropriate Case Plan to associate to the Case Review.

The worker selects 1 or more reasons for needing to complete a Case Review. (MSS) (Checkbox)

The system displays a case participant list from the case. (dialog box)

The worker reviews/edits case participant(s) from the case participant list.

The worker selects the primary and secondary caregivers.

Safety Re-Assessment page (Section 2)

Safety Review (2A)

The system presents the requested screen concerning Safety Re-Assessment, with three case circumstance options available. (MSS) (Section 2 Safety Re-Assessment: Safety Review 2A)

The worker selects the case circumstance option indicating “A safety threat is active now”. Once worker selects the appropriate case circumstance, the additional fields that support two of the three options are disabled. (Section 2A – 3 Safety Review) (Checkbox)

The worker records narrative information to Item 1 (Section 2A 3a) describing the active safety threat(s). (MSS) (textbox)

The worker records narrative information to Item 2 (Section 2A 3b) describing the present protective capacities of each caregiver. (MSS) (textbox)

The worker records narrative information to Item 3 (Section 2A 3c) describing the present vulnerability of each child. (MSS) (textbox)

Safety Response Review (2B)

The worker selects the Safety Response selection ‘Maintain’ indicating a safety response is unchanged and needs to continue. (Section 2B Safety Response Review). (MSS) (Checkbox)

Emerging Danger Re-Assessment (2C)

The worker selects ‘No’ to indicate there was not an emerging danger completed in the previous assessment (MSS) (Section 2C, Item 1A - Emerging Danger Re-Assessment). (Yes/No Checkbox)

The system will disable the rest of that section (Is this emerging danger still active) and skips to Section 2C, Item 2A.

The worker selects ‘Yes’ to indicate there is a new emerging danger that has been identified during this assessment period (MSS) (Section 2C, Item 2A). (Yes/No Checkbox)

The worker selects 1 or more emerging danger characteristics identified during the current assessment period (MSS) (Section 2C, Item 2B). (Checkbox)

The worker records the emerging danger and how it was, or will be, addressed (Section 2C, Item 2B). (MSS) (textbox)

The worker selects Yes” to indicate whether or not the new emerging danger is still active (MSS) (Section 2C, Item 2C). (Yes/No Checkbox)

Family Perception (2D)

The worker records Family Perceptions and information on how the family and other individuals involved in the case view their own strengths and problem areas (Section 2D - Family Perception). (MSS) (textbox)

Case Progress Review page (Section 3)

Services Review (3A)

The worker requests the screen representing Section 3A: Case Progress Review.

The system presents the requested screen.

The system displays every Concern identified from the approved case plan. (Case Plan section 2A)

The system auto fills the list of all services provided/planned to address each concern. Case Plan 2a#2 will populate Case Review 3A #1. (textbox) (MSS)

The worker records service recommendation for every service linked to that concern. (Continue, Modify, Terminate) (MSS) (Checkbox)

The system auto fills the start date of the service provided in response to the concern from the most recent approved case plan or approved amended case plan. CM05 Maintain Case Plan (UC96)

The worker optionally edits the start date.

The worker repeats MSS steps 27 through 31 until all current concerns and the related services provided/planned information are recorded.

The worker records details about the impact the service(s) provided/planned has toward addressing safety, emerging danger, risk, permanency and/or child well-being issues, as well as existing barriers to receiving or benefiting from the services. (MSS)

The worker records the level of progress made toward addressing the concern. (Significant, Some, Insufficient) (MSS)

The worker navigates to Case Services and records services details. (needed, planned, provided) CM10 Record Case Services (UC303)

The worker optionally records case plan parties with whom the case review services were reviewed and the date(s) reviewed.

Strengths and Needs Update (3B)

The worker requests the screen representing Section 3B: Strengths and Needs Update.

The system presents the requested screen, with pre-defined (or static) assessment elements listed for four pre-defined (or static) categories: Child Functioning, Adult Functioning, Family Functioning, and Historical displaying Checkbox (Yes) and Checkbox (No) for each of the sixteen (16) assessment elements. (MSS)

The worker describes what family dynamics continue to create or increase the likelihood of maltreatment to a child. (Section 3B1) (textbox) (MSS)

The worker describes the most significant new information regarding underlying conditions, protective capacities, child vulnerability and child harm and new life events which occurred since the last assessment. (Section 3B2) (textbox) (MSS)

The worker summarized the key case activities, including the frequency and type of agency visits with parent or caretaker and child, which have occurred since the last assessment or review. (Section 3B3) (textbox) (MSS)

The worker describes the quality of visitation between family and child in placement which has occurred since the last assessment. (Section 3B4) (MSS)
Risk Re-Assessment Scale of Abuse/Neglect (3C)
The worker requests the screen representing Section 3C: Risk Reassessment Scale of Abuse/Neglect.
The system presents the requested screen.
The worker records Family Risk Re-assessment of Abuse/Neglect information. (Section 3C) (MSS) Note: Risk Re-assessment instrument also appears in CM49 Record Post Family Assessment/Investigation
The system calculates the actual risk level.
The worker applies state and/or county policy override. If policy overrides were applied, the system automatically rates final risk level as intensive. (MSS)
The worker applies mandatory policy override and/or discretionary override as applicable. (MSS)
The worker describes reason for any mandatory policy override and/or discretionary override. (textbox)
The worker records override/final risk level. (MSS)
Case Status (3D)
The worker requests the screen representing Section 3D: Case Status of the hard copy Case Review form.
The system presents the requested screen.
The worker selects 1 or more options describing the case status – In-Home Supportive Services, Protective Supervision, and/or Out-of-Home Placement. (MSS) (Checkbox)
The worker selects the case status option “Continue Agency Involvement-Family in Need of Agency Services”. (Checkbox)
The system disables the selection option of terminating services and all subcategories are disabled.
The worker records the reasons for the case status selected. (textbox)
The worker saves the information as a ‘Work in Progress’.
The system generates a dialog box that asks ‘Do you need to do a reunification assessment?’
The system validates the correct sections of the Case Review have been recorded.
The worker requests supervisory approval. Route and Apply Approvals UC.

Scenario 2: Safety Re-Assessment (Section 2): Child is in PC (permanent custody).
(Skip Section 2 and start at Section 3).

The worker completes MSS Steps 1-11.
The system presents the requested screen concerning Safety Re-Assessment (Section 2 Safety Re-Assessment)
The system identifies that the child is in Permanent custody and auto fills a N/A with signifies that this section is not required if the child is in permanent custody.
(Section 2 Safety Re-Assessment)
The system disables Section 2 Safety Re-Assessment.
The worker requests the screen representing Section 3A: Case Progress Review.
The worker completes Steps 25 – 42 of the MSS.
The worker requests the screen representing Section 3C: Risk Reassessment Scale of Abuse/Neglect of the hard copy Case Review form.
The system presents the requested screen.
The system auto fills N/A as the child was previously identified as being in permanent custody.

The system disables Section 3C: Risk Re-assessment.
The worker completes MSS 51 – 60.

Scenario 3: Read(view) a Case Review

Example: Suzie, who is the worker assigned to the Smith case, in preparing for a family visit, Suzie wants to review the most recent case review created on the family.

The worker accesses a case.
The worker selects an existing Case Review for the case.
The system presents the selected Case Review.
The worker navigates through the existing Case Review in order to view the desired sections.

Scenario 4: Update a Case Review (prior to supervisory approval)

Example: Suzie, who is the worker assigned to the Smith case, received a call from the mother and who contact the worker the next day to clarify some comments that were made during the visit. Based on this information, Suzie determines that she needs update the Case Review she completed the day before.

Scenario 5: Delete a Case Review (prior to supervisory approval)

Example: Suzie, the worker assigned to the Smith case, realized that the Case Review she completed yesterday for the Smith family was completed in error. Suzie has not received her supervisor's approval on the Case Review. Suzie deletes the Case Review.

The worker accesses a case.
The worker selects an existing Case Review for the case.
The system presents the selected Case Review.
The worker deletes the existing Case Review.

Scenario 6: Delete a Case Review (after supervisory approval)

Example: Suzie, the worker assigned to the Smith case, desires to delete the Case Review after supervisory approval and create a new Case Review. Suzie is not able to delete the approved Case Review.

The worker accesses a case.
The worker selects an existing Case Review for the case.
The system presents the selected Case Review.
The delete button is disabled and the worker is unable to delete the selected approved Case Review.

Page Break

Alternate Flows

Safety Re-Assessment Alternative Flows

12a. A Safety Threat is not Identified for the Family (Not Currently Active for the Family) /No Emerging Danger Identified (Section 2A, Item 2: Safety Re-Assessment - Safety Review) (a threat has not been identified since the last assessment of safety) (Safety Re-Assessment-Safety Review) (Section 2A)

Example: A Safety Threat is not currently active. No safety threat currently exists.

Safety Response: Maintain

No Emerging Danger was identified in Previously Completed Assessment (2C1).

No Emerging Danger was identified Current Assessment (2C2).

The worker completes MSS Scenario Steps 1-11.

Safety Re-Assessment page (Section 2)

Safety Review (2A)

The system presents the requested screen concerning Safety Re-Assessment, with three case circumstance options available. (MSS) (Section 2 Safety Re-Assessment: Safety Review 2A)

The worker selects the case circumstance option indicating a “A safety threat is not currently active”. Once worker selects the appropriate case circumstance, the additional fields that support two of the three options are disabled. (MSS) (Section 2A Safety Review). (Checkbox)

Safety Response Review (2B)

The system auto fills the Safety Response selection ‘Maintain’ indicating a safety response is unchanged and needs to continue. (MSS) (Section 2B Safety Response). (Checkbox)

Emerging Danger Re-Assessment (2C)

The worker selects ‘No’ to indicate whether or not a new emerging danger has been identified during the previous assessment period (Emerging Danger Section 2C # 1). (Yes/No Checkbox)

The worker selects ‘No’ to indicate whether or not a new emerging danger has been identified during the current assessment period (Emerging Danger Section 2C # 2). (Yes/No Checkbox)

Family Perception (2D)

The worker records Family Perception and narrative information describing how the family and other individuals involved in the case view their own strengths and problem areas (2D). (Textbox)

The worker continues with Case Progress Review – Services Review (3A) Steps 25 – 60 of the MSS.

12b. A Safety Threat is Not Currently Active but has been Active since the Last Assessment was Completed (Section 2: Safety Re-Assessment - Safety Review (Section 2A2))

Discontinued Safety Plan

Example: The threat to the child(ren) is not currently active but has been active since the last assessment. The worker selects the safety response of Discontinued or Previously Discontinued Safety Plan. (Note: there will never be maintain, create or modify for this scenario).

The worker completes MSS Scenario Steps 1-11.

Safety Re-Assessment page (Section 2)

Safety Review (2A)

The system presents the requested screen concerning Safety Re-Assessment, with three case circumstance options available. (Section 2 Safety Re-Assessment: Safety Review 2A)

The worker selects the case circumstance option indicating “Safety Threat not Currently Active but had been Active since Last Assessment was completed”. Once worker selects the appropriate case circumstance, the additional fields that support two of the three options are disabled. (Section 2A2) (Checkbox)

The worker records a response to (2A #2a) describing the ‘not active safety threat but was previously active since last assessment safety threat’. (Textbox) (MSS)

Safety Response Review (2B)

The worker selects the safety response: Discontinued (Section 2B Safety Response). (check box)

The system displays a dialog box asking the worker to change the safety plan.

The system displays the Safety Plan. (Safety Plan JFS 0XXXX)

The worker records the date the safety plan was discontinued and safety threat resolution information. (textbox) (Safety Plan Section 3) IV06 Maintain Safety Plan (UC81)

The system auto fills the discontinued date into the Case Review (2B) from the Safety Plan (Section 3)

The worker records the date the safety response was or is to be discontinued.

The worker continues with Emerging Danger Re-Assessment (2C) Steps 18 – 60 of the MSS.

12c. Safety Re-Assessment - Safety Review (Section 2A) A Safety Threat is Not Currently Active but has been Active since the Last Assessment was Completed

Previously Discontinued Safety Plan

The worker completes MSS Scenario Steps 1-11.

Safety Re-Assessment page (Section 2)

Safety Review (2A)

The system presents the requested screen concerning Safety Re-Assessment, with three case circumstance options available. (Section 2 Safety Re-Assessment: Safety Review 2A)

Safety Response Review (2B)

The worker selects the safety response of 'Previously Discontinued'. (Need to flush out the business rules for the system to auto fill 'Previously Discontinued' into the case review (Court Event, Safety Plan are triggers) (Checkbox)

The system will pull forward the previously discontinued date from the most recent approved safety plan into the Case Review Safety Response 2B.

The worker continues with Emerging Danger Re-Assessment (2C) Steps 18 – 60 of the MSS.

Safety Response Alternative Flows

17a. Safety Response (Section 2B): Create or Modify the Safety Response

Create (C2B)– The worker creates a new safety response

Modify (C2B) – The worker develops a revised safety response as needed

The worker completes MSS Scenario Steps 1-16.

Safety Response Review (2B)

*The worker selects the Safety Response selection 'Create' or 'Modify' indicating a safety response has been implemented and needs to continue. (Section 2B Safety Response). (Checkbox)
The system displays a dialog box that displays instructing the worker to modify or create a safety response.*

When the worker selects create or modify safety response is selected, an email notification is sent to the supervisor in the case review informing them that a safety response needs to be modified or created.

The worker continues with Emerging Danger Re-Assessment (2C) Steps 18 – 60 of the MSS.

Emerging Danger Re-Assessment Alternative Flows

18a. Emerging Danger Re-Assessment (Section C1): No emerging danger identified in the previous completed assessment. (2C Item 1)

No Previous Emerging Danger

Emerging Danger Re-Assessment (2C)

See Main Success Scenario

18b. *Emerging Danger Re-Assessment (Section C1): Emerging danger identified in the previous completed assessment. (2C Item 1)*

Previous Emerging Danger (from previous completed assessment)

Emerging Danger Still Active (from previous completed assessment)

The worker completes MSS Scenario Steps 1-17.

Emerging Danger Re-Assessment (2C)

The worker selects ‘Yes’ to indicate there was an emerging danger completed in the previous assessment (Section 2C, Item 1a). (Yes/No Checkbox)

The worker selects 1 or more emerging danger characteristics identified in the previous completed assessment. (Section 2C, Item 1b) (MSS)

The worker records the emerging danger and how it was addressed. (Section 2C, Item 1b). (textbox) (MSS)

The worker selects ‘Yes’ to indicate that this emerging danger is still active (previously completed assessment) (Section 2C, Item 1c). (Yes/No Checkbox)

Family Perception (2D)

The worker records Family Perception and narrative information describing how the family and other individuals involved in the case view their own strengths and problem areas (2D). (Textbox)

The worker continues with Case Progress Review – Services Review (3A) Steps 25 – 60 of the MSS.

18c. *Emerging Danger Re-Assessment (Section 2C1): Emerging danger identified in the previous completed assessment but not still active. (2C Item 1)*

Previous Emerging Danger (from previous completed assessment)

Emerging Danger Not Active (from previous completed assessment)

The worker completes MSS Scenario Steps 1-17.

Emerging Danger Re-Assessment (2C)

The worker selects ‘Yes’ to indicate there was an emerging danger completed in the previous assessment (Section 2C, Item 1a). (Yes/No Checkbox)

The worker selects 1 or more emerging danger characteristics identified in the previous completed assessment. (Section 2C, Item 1b) (MSS)

The worker records the emerging danger and how it was addressed. (Section 2C, Item 1b). (textbox) (MSS)

The worker selects ‘No’ to indicate that this emerging danger is still active (previously completed assessment) (Section 2C, Item 1b). (Yes/No Checkbox)

Family Perception (2D)

The worker records Family Perception and narrative information describing how the family and other individuals involved in the case view their own strengths and problem areas (2D). (Textbox)

The worker continues with Case Progress Review – Services Review (3A) Steps 25 – 60 of the MSS.

18d. *Emerging Danger Re-Assessment (Section C1): No new emerging danger identified in current assessment. (2C Item 1)*

No Previous Emerging Danger Identified during this assessment period

No Current Emerging Danger Identified during this assessment period

The worker completes MSS Scenario Steps 1-17.

Emerging Danger Re-Assessment (2C)

The worker selects ‘No’ to indicate there was not an emerging danger in the Previous assessment (Section 2C, Item 1A). (Yes/No Checkbox)

The system disables the remainder of Section C1A and displays Section C2A New Emerging Danger.

The worker selects 'No' to indicate there was not an emerging danger in the current assessment (Section 2C, Item 2A). (Yes/No Checkbox)

The system disables the remainder of Section C2A and displays Section 2D Family Perception Family Perception (2D)

The worker records Family Perception and narrative information describing how the family and other individuals involved in the case view their own strengths and problem areas (2D). (Textbox)

The worker continues with Case Progress Review – Services Review (3A) Steps 25 – 60 of the MSS.

18e. Emerging Danger Re-Assessment (Section C1): No emerging danger in previous assessment and there is a new emerging danger identified in current assessment. (2C Item 2)

Emerging Danger identified during this assessment

Emerging Danger Not Active (during this assessment)

The worker completes MSS Scenario Steps 1-17.

Emerging Danger Re-Assessment (2C)

The worker selects 'No' to indicate there was not an emerging danger in the Previous assessment (Section 2C, Item 1A). (Yes/No Checkbox)

The system disables the remainder of Section C1A and displays Section C2A New Emerging Danger.

The worker selects 'Yes' to indicate there is an emerging danger in the current assessment (Section 2C, Item 2A). (Yes/No Checkbox)

The worker selects 1 or more emerging danger characteristics identified for the new emerging danger. (Section 2C, Item 2B) (MSS) (Checkbox)

The worker records the new emerging danger and how it was addressed. (textbox)

The worker records if the emerging danger is still active. (C2C) (Yes/No Checkbox)

Family Perception (2D)

The worker records Family Perception and narrative information describing how the family and other individuals involved in the case view their own strengths and problem areas (2D). (textbox)

The worker continues with Case Progress Review – Services Review (3A) Steps 25 – 60 of the MSS.

42a. Strengths and Needs Update (Section 3B): Child(ren) are not Placed out of the Home. (Section 3B Item 4)

The worker completes MSS Scenario Steps 1-41.

The system auto fills N/A that the children are not placed out of the home and the textbox is disabled. Strengths and Needs Update (Section 3B #4)

The worker continues with Case Progress Review – Services Review (3A) Steps 43 – 60 of the MSS.

43a. No Child Abuse or Neglect: No Risk Re-Assessment Completed (Section 3C)

The worker completes MSS Scenario Steps 1-42.

The system will disable the Risk Re-Assessment. (Section 3C)

The worker continues with Case Progress Review – Services Review (3A) Steps 51 – 60 of the MSS.

Additional Alternative Flows (AAF)

AAF I. When Case Review and SAR are done at the same time.

If the Case Review is designated as a SAR type, the system will auto-populate the all historical information (Case Review – Services Review from Section 3A) recorded in previous case reviews (since the last case review designated as SAR).

Note: when complete an initial case review that is not designated for SAR, no historical information from previous review auto-populates.

AAF 2. *If a child is in PC, the child will have his/her own case and is a separate entity. The system does not display the following pages:*

Safety Re-Assessment (Section 2)

Risk Re-Assessment Scale of Abuse/Neglect (Section 3C)

Adult Functioning, Family Functioning and Historical (Strengths/Needs Section 3B)

AAF 3. *If Overrides to Risk Reassessment were applied in Section 3C Risk Reassessment requires secondary approval. The process done for Family Assessment, Case Review.*

- 1. Worker documents the reason for applying the discretionary override.*
- 2. Route Approval by Worker to Supervisor: Case Review will be sent to the supervisor for review (not approval because the regular supervisory approval process normally locks the case review)*
- 3. The supervisor reviews case review approval window, records case review was reviewed (checkbox and date), records notes as needed (textbox) noted on the approval page that it was reviewed by the supervisor.*
- 4. Route and Apply Approvals for Overrides to Risk Reassessment: Supervisor routes Case Review to the Override Approver for approval of the discretionary override.*
- 5. Approval Process by Override Approver: 1) If it is approved then it is approved and the case review is locked. 2) If gets denied then it routed back to the supervisor who will then route it back to the worker and the process starts over.*

AAF 4. *Case status option "Terminate Agency Services". (MSS)*

- 1. If you are closing the case, terminate all services for the child, parent, and caretaker. See Case Status Pick list (Terminate Agency Services) Notification Form: CM16 Process Case Closure Checklist*