Placement Quick Guide

For Probation

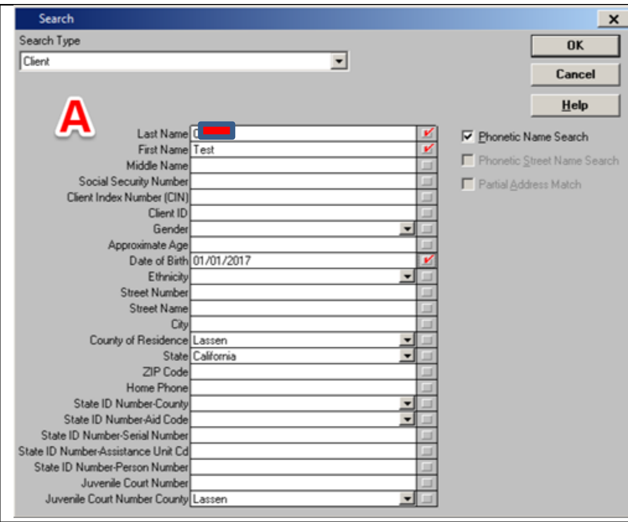
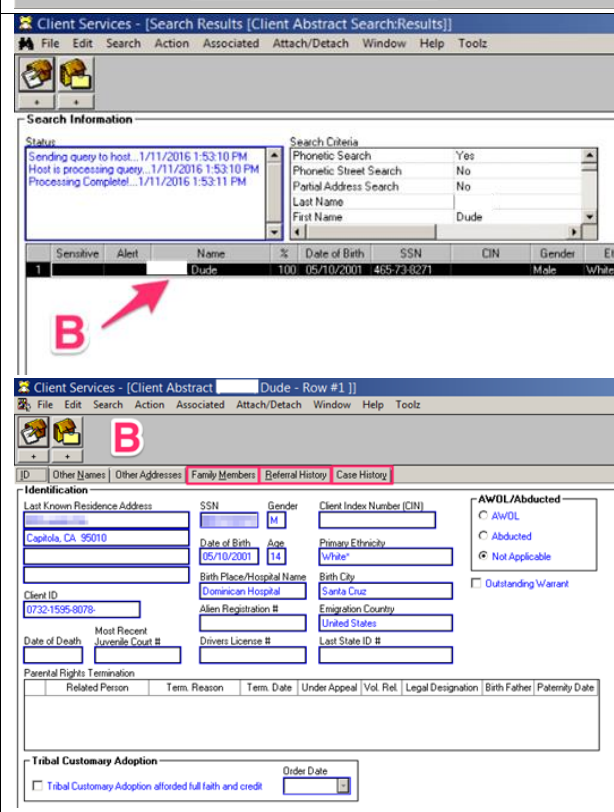
Resource Center for Family-Focused Practice

January 2019

Contents

Creating a New Case for an Existing Client in the CWS/CMS Database

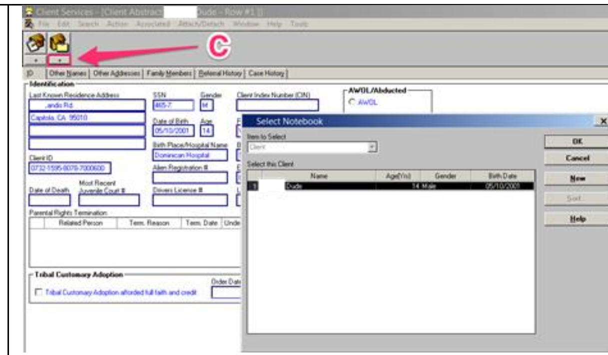
(Note: When searching for a client to create a new case, complete a diligent search of the database. This includes searching for the youth and if unable to locate, searching for the parents or siblings and double-clicking on their name to open their client abstract to determine if the youth you're searching for is listed under the family members tab with a different name, spelling, or DOB. Search the database by the new information you found to assure you will attach the youth's CWS case history to the new case and avoid duplicating a client that would then have to be merged.)

A. Search for Client by Name and one other search criteria such as DOB.	
B. Double click on the client's name to open their client abstract. Review family members, referral history and case history tabs to assure you have the correct client and that no CPS referrals or cases are currently open that would keep you from creating a new case.	

<table>
<tr>
<td>

C. Click the plus sign under Create New Case Folder (If your youth's name appears in the open window **proceed**. If it does not appear even though your search located the youth in the database, **do not proceed** as this means a CPS referral or case has not yet been closed and must be closed before proceeding or you will duplicate clients that will have to be merged).

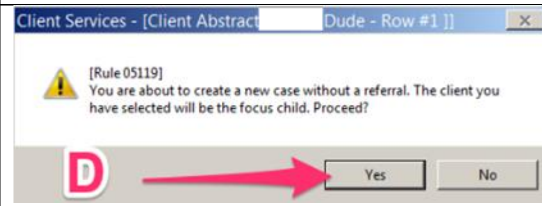
</td>
<td>



</td>
</tr>
<tr>
<td>

D. Click "Yes" to the message that appears "You're about to create a new case without a referral."

</td>
<td>



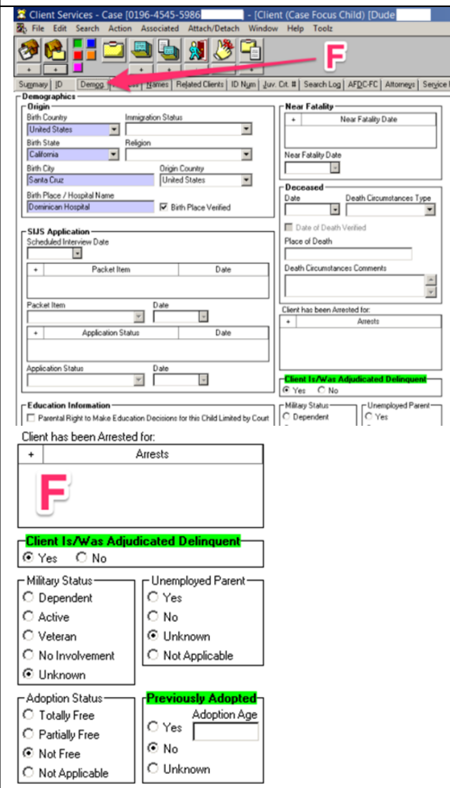
</td>
</tr>
<tr>
<td>

E. The "Client Notebook" opens already filled out *(Check that all the information is up to date and change if needed. Assure that all Yellow, Green, and Periwinkle fields have been completed).*

</td>
<td></td>
</tr>
<tr>
<td>

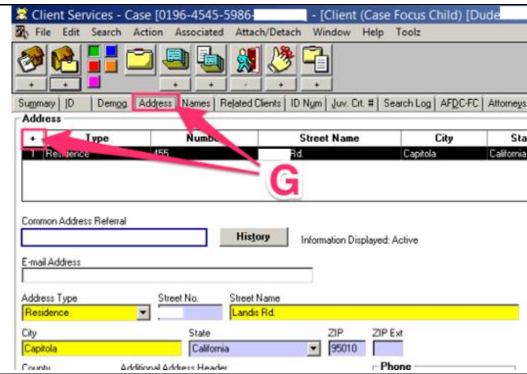
F. Click on the "Demog" tab and complete all Periwinkle and Green fields to include immigration status, adjudicated delinquent, and previously adopted fields. Unknown is not an acceptable answer for previously adopted and will show you as out of compliance when reviewing AFCARS federal reporting data.

</td>
<td>

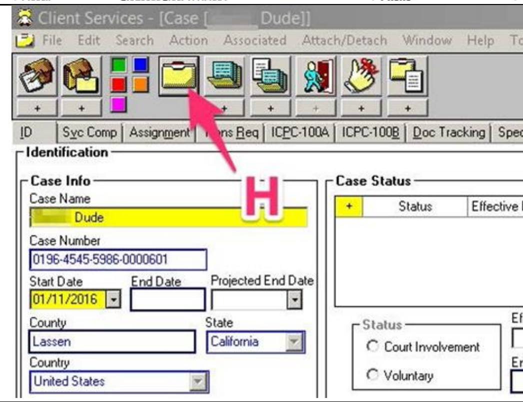


</td>
</tr>
</table>

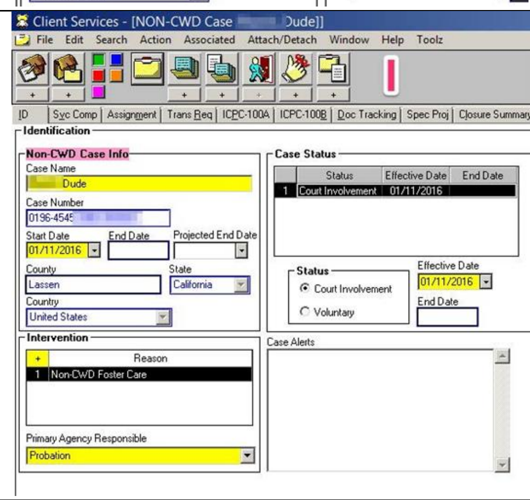
G. Click on the “Address” tab, click the plus sign under address to activate the fields and enter the youth’s residence address prior to arrest.



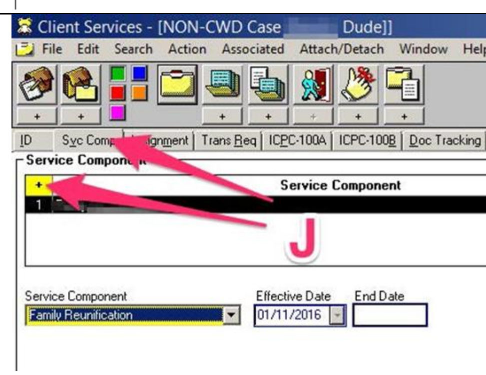
H. Click the Manila file folder Icon/ Notebook.



I. Complete all mandatory fields on the ID tab *(Remember the start date of the case and court involvement dates are the date the youth appeared in court and was ordered into placement by the Judge).*

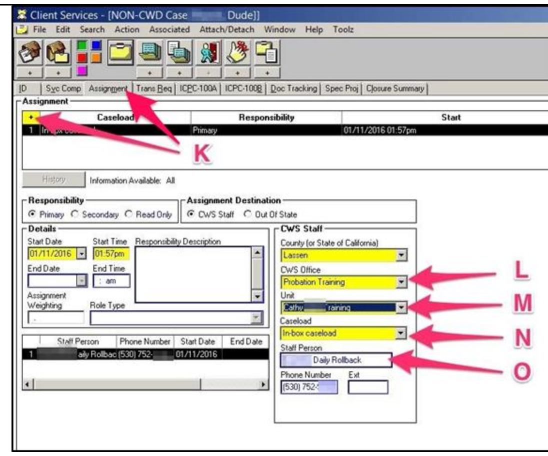


J. Click on the “Svc Comp” tab. Click the plus sign under service component to activate the fields. Add service component. *(The effective date populates from the ID tab and matches the start date of the case. Most common service component for a new case is “Family Reunification” and later changes to “Supportive Transition” for your NMD (Non-Minor Dependent) youth who are eligible and opt-in to extended foster care services per AB12).*



K. Click the “Assignment” tab. Click the plus sign under assignment *(defaults to primary assignment. You may add as many secondary assignments as needed. Common secondary assignment goes to support staff, PHN’s, and other assigned workers on dual jurisdiction or WIC 241.1*

cases).	
L. Choose the “CWS Office” from the dropdown menu.	
M. Choose the “Unit” from the dropdown menu.	
N. Choose the “Caseload” from the dropdown menu.	
O. Choose the “Staff Person” from the dropdown menu.	



(SAVE TO DATABASE)

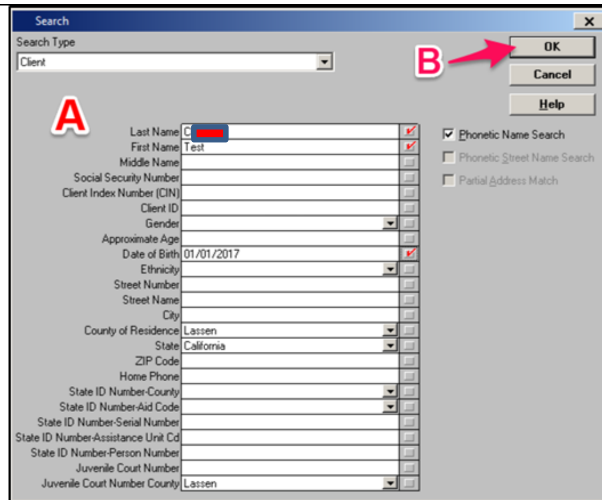
Once you've created the case and saved it to the database, open the case and review client notebooks to see if you need to search and attach clients or create new client notebooks and relate them following the instructions in this guide. Each client must have a client notebook to be chosen as a participant in a contact note.

Note: To create a case without client history in the database, follow steps C through O above clicking on the plus-sign to create new case, choose “New” from the blank open window, and beginning with step D above, filling out the blank client notebook. Proceed with steps E-O. You can search and attach existing clients to the case or if unable to locate through search, create new client notebooks and relate all clients on the “Related Clients” tab as in step G above.

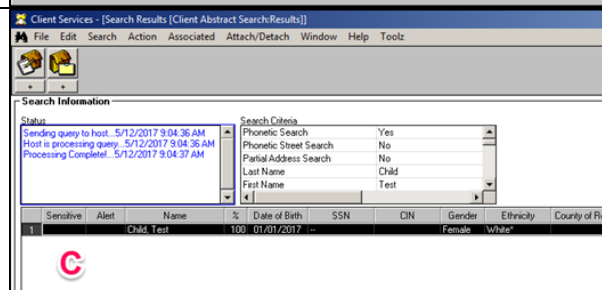
Searching and Attaching Existing Client Notebooks

A. From your open case click on the search drop-down menu and choose start search. In the open window, type the name of the client you're searching for and at least one other identifying criterion such as birthdate.

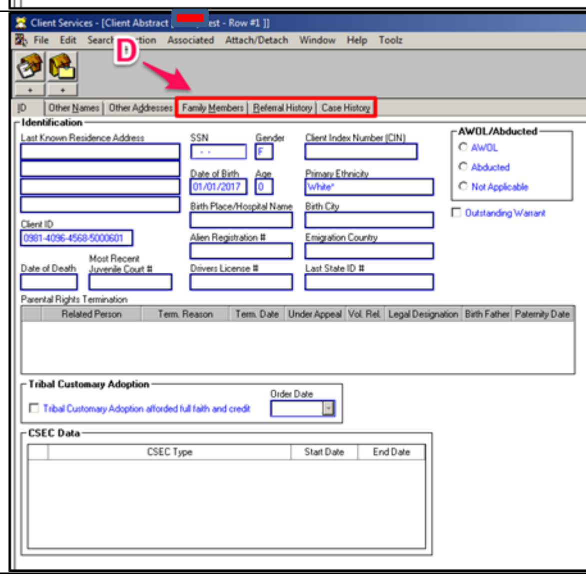
B. Click OK.

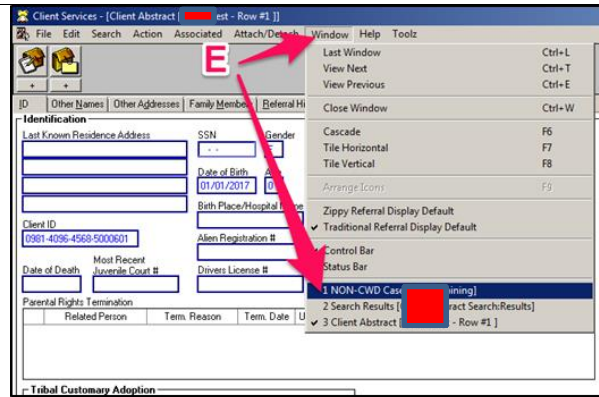
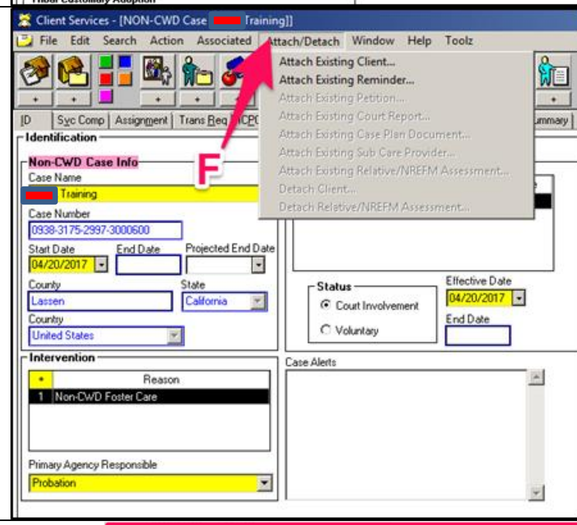
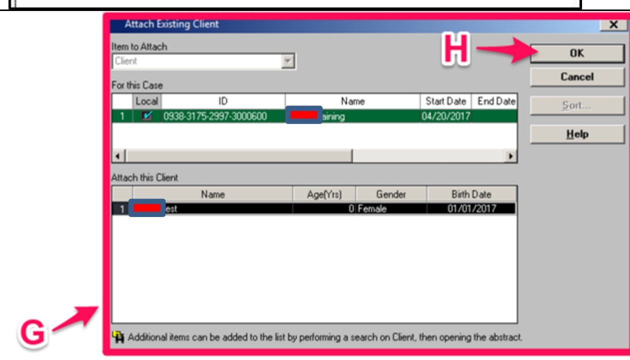
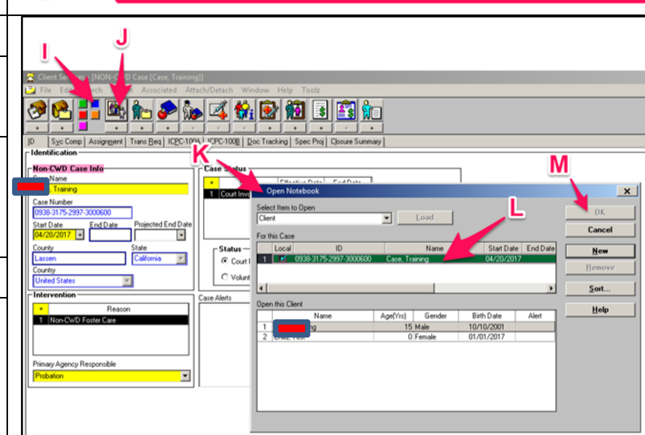


C. Double click on your search results to open the client abstract.



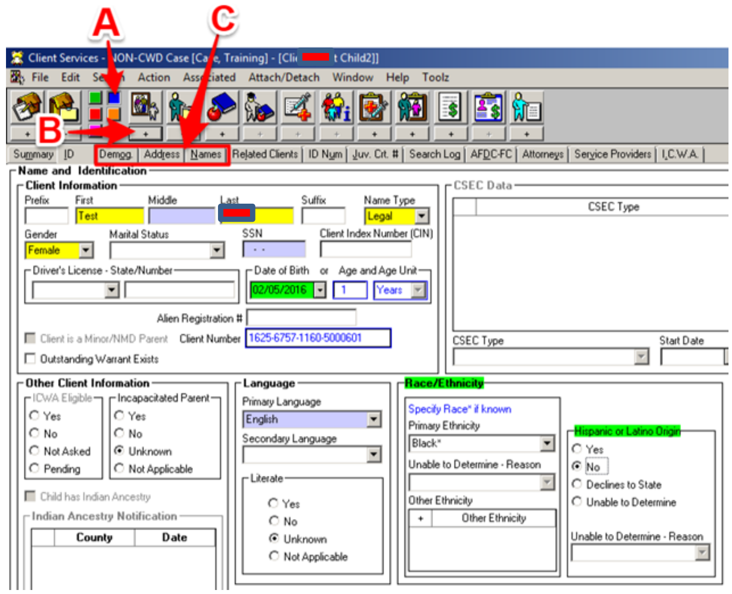
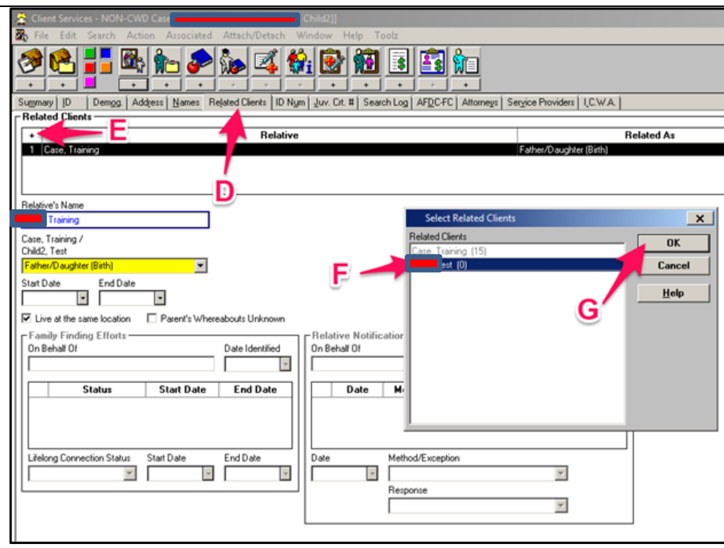
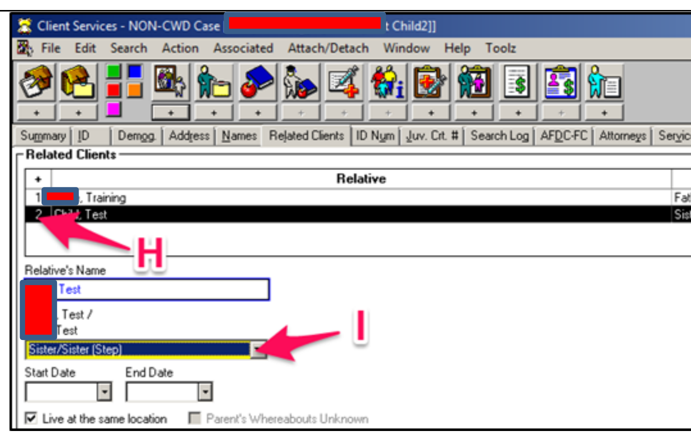
D. Review the page tabs for Family Members, Referral history and Case history to assure you have the correct client.



E. Click on the window drop-down menu and choose the Non-CWD Case to get back in your open case.	
F. Click on the Attach/Detach drop-down menu and click on attach existing client.	
G. A new window appears with the name of the client you just searched for. Highlight their name.	
H. Click OK.	
I. Click on the blue client management section.	
J. Click on the first icon to the right of the colored sections for “Open Existing Client.”	
K. A new window opens with all the client notebooks and you should see the name of the client you just attached.	
L. Click on their name.	
M. Click OK and from the open client notebook review the information on the ID, Demog, Address and Names pages for accuracy and update as necessary.	

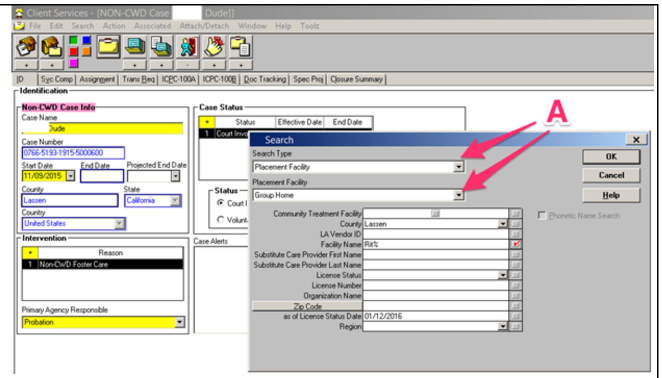
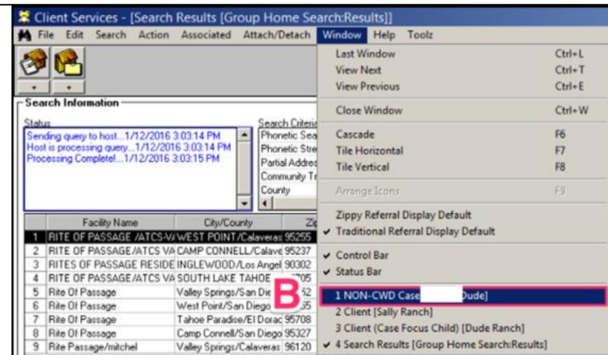
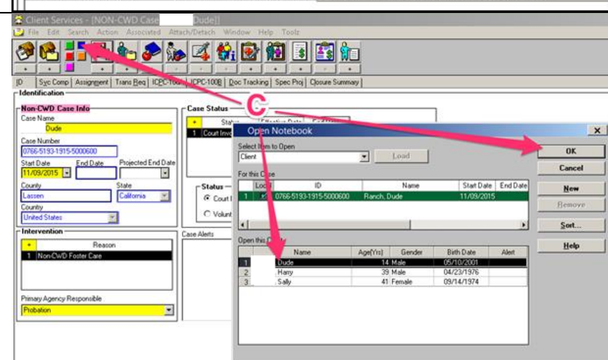
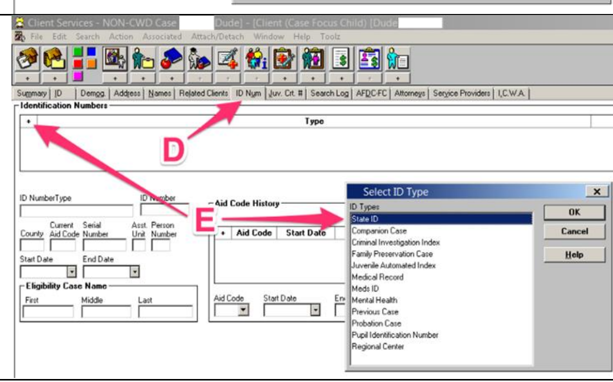
(SAVE TO DATABASE)

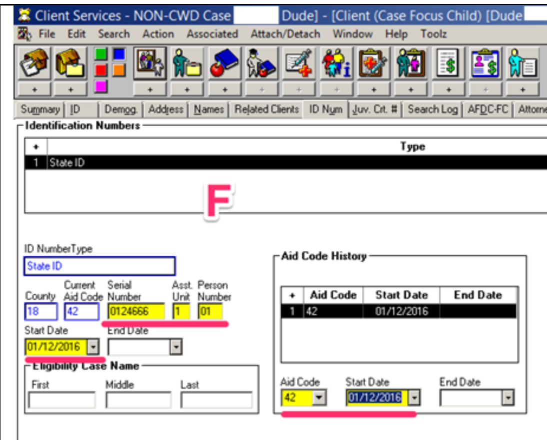
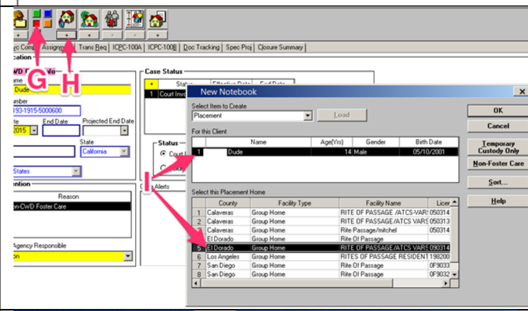
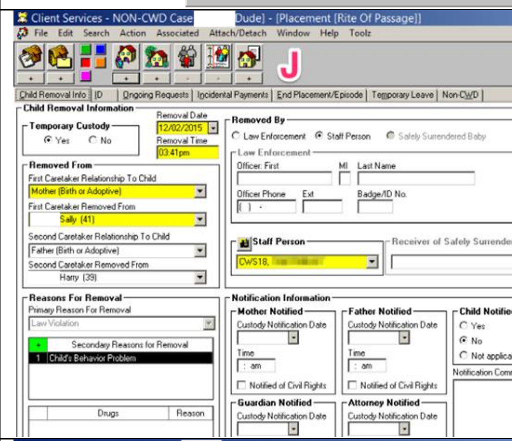
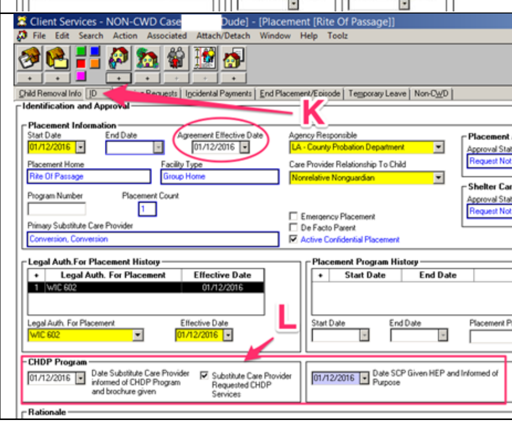
Creating New Client Notebooks

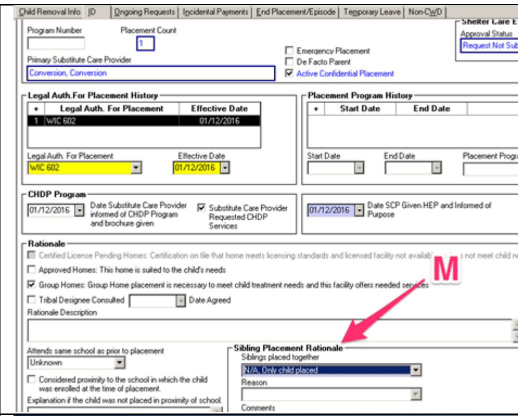
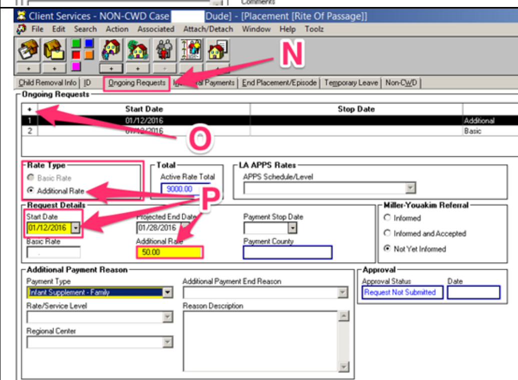
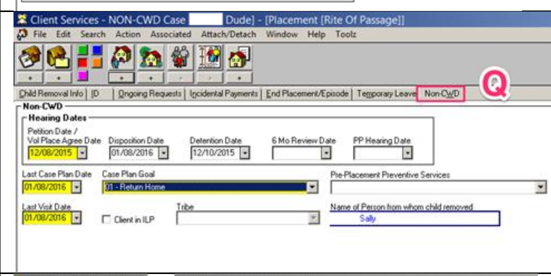
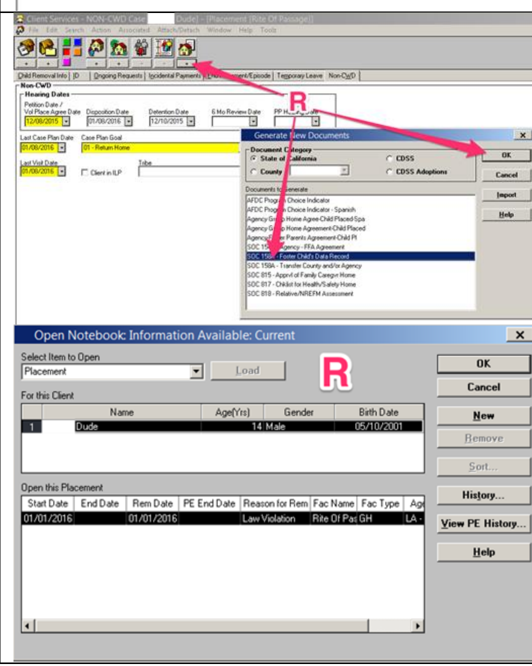
<table>
<tr><td>A. Click on the Blue Client Management Section.</td><td rowspan="3">
</td></tr>
<tr><td>B. Click on the plus sign under the first notebook to the right of the colored sections for “Create New Client.” A blank client notebook opens. Complete all yellow, green, and periwinkle fields on the ID page.</td></tr>
<tr><td>C. Complete the “Demog, Address, and Names” pages with as much information as you have.</td></tr>
<tr><td>D. Click on the “Related Clients” page.</td><td rowspan="4">
</td></tr>
<tr><td>E. Click the plus sign under related clients.</td></tr>
<tr><td>F. From the open window highlight any names that appear in bold.</td></tr>
<tr><td>G. Click OK.</td></tr>
<tr><td>H. Highlight each row number.</td><td rowspan="2">
</td></tr>
<tr><td>I. From the yellow drop-down menu choose the appropriate relationship always relating the first person in the grid to the second person. In the example, sister/sister step.</td></tr>
</table>

(SAVE TO DATABASE)

Creating a Foster Care Placement

<table>
<tr>
<td>A. Start Search and change search criteria from client to "Placement Facility." A second drop down menu appears titled "Placement Facility." (Search Tip: If searching in State choose "Group Home/FFA" from the second dropdown menu and type in the license number of the facility in the search field. If searching out of State, choose "Group Home" from the second dropdown menu and uncheck your county and type in the facility name. For best results use a portion of the name and your wild card (%). Example: for Rite of Passage type Rit% in the facility name field).</td>
<td>
</td>
</tr>
<tr>
<td>B. Your Search list appears. (You do not need to double click on any of the search results unless you want more information about the facility, such as address and contact). Go to your "Window" dropdown menu and choose "Non-CWD Case" or any of the other open windows at the bottom of the list to get out of your search results and back to the case.</td>
<td>
</td>
</tr>
<tr>
<td>C. Click on the Blue Client Management Section and from the first icon/notebook to the right, open existing client notebook. From the list of clients that appears, highlight your youth's name and Click OK. (You can skip steps C-F if this is not the first placement recorded and a State ID number has already been documented).</td>
<td>
</td>
</tr>
<tr>
<td>D. Click on the "ID Num" tab.</td>
<td rowspan="2">
</td>
</tr>
<tr>
<td>E. Click on the plus sign under "Identification Numbers" and choose "State ID" from the open window that appears.</td>
</tr>
</table>

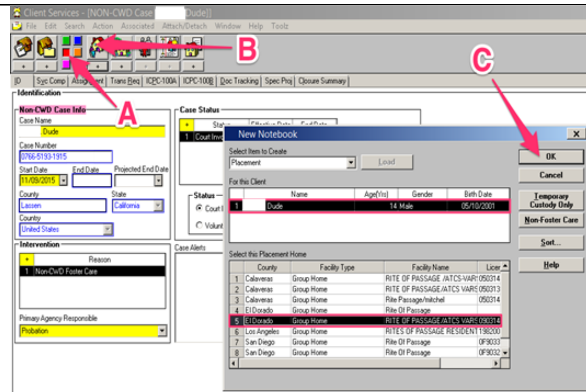
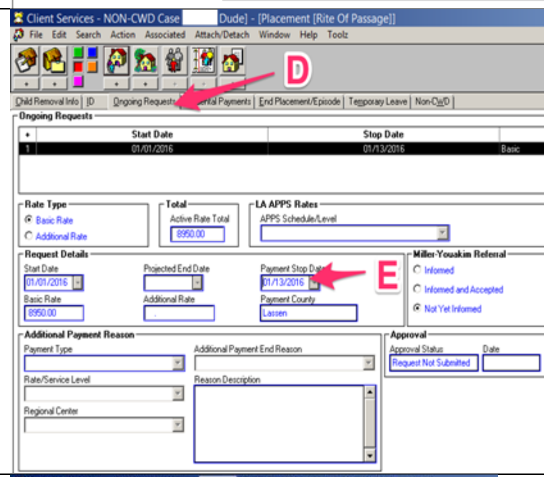
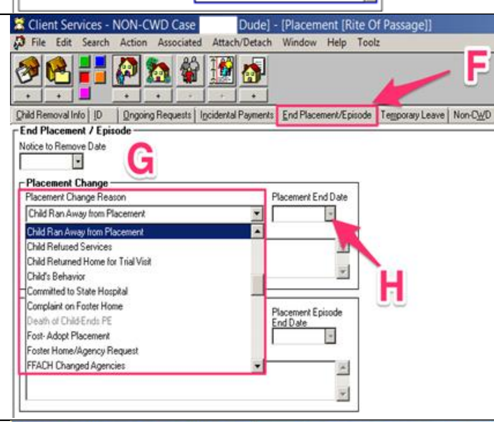
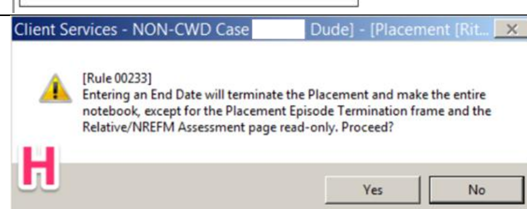
F. Complete all mandatory Yellow fields with information obtained from your county eligibility staff.	
G. Click on the Red Placement Management Section.	
H. Click on the plus sign under the first Icon/notebook, the picture of the house with the people standing in front of it.	
I. From the window that appears, highlight your youth's name and highlight the facility from the list shown. Tab out of the field and Click OK.	
J. Complete all Yellow and Green fields on the "Child Removal Info" Page. *(This step is only completed for the initial placement. Hereafter you will be directed to this page to begin recording your placement updates but you will skip directly to the "ID" page as the removal information doesn't change.)*	
K. Click on the ID page and complete all Yellow fields. *(Do not forget the "Agreement Effective Date." It is not a yellow field, but you will not be able to close your case without one.)*	
L. Complete the three CHDP fields.	

M. Complete "Sibling Placement Rationale." unless youth is an NMD.	
N. Click the "Ongoing Requests" tab.	
O. Click the plus sign under "Ongoing Requests" to activate the fields on this page.	
P. Complete the two mandatory Yellow Fields. *(Rate type defaults to basic rate. Click the plus sign and click on "additional rate" if applicable for monthly supplemental payments such as Infant Supplement – Family. Complete one time "Incidental Payment" tab for expenses such as clothing allowances.)*	
Q. Click on the Non-CWD tab and complete all fields as shown in the sample screen shot. You must update the Non-CWD tab with the latest hearing dates, last case plan date and last visit date after every review hearing.	
R. Complete the SOC 158A. Click the plus sign under the last icon/notebook *(The house with the document behind it)* and choose "Soc158A Foster Child's Data" Click OK and OK again on the next window. Your document is populated. Print a hard copy for your file and send one to Eligibility. *(Note: The first time you complete a placement in the system to include the child removal page you will need to save to database before the information is available to create the SOC158A document. Thereafter, upon future placements, the document can be generated prior to saving to the database.)*	

(SAVE TO DATABASE)

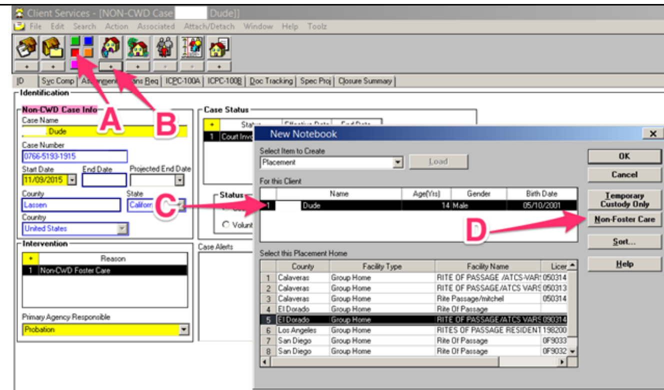
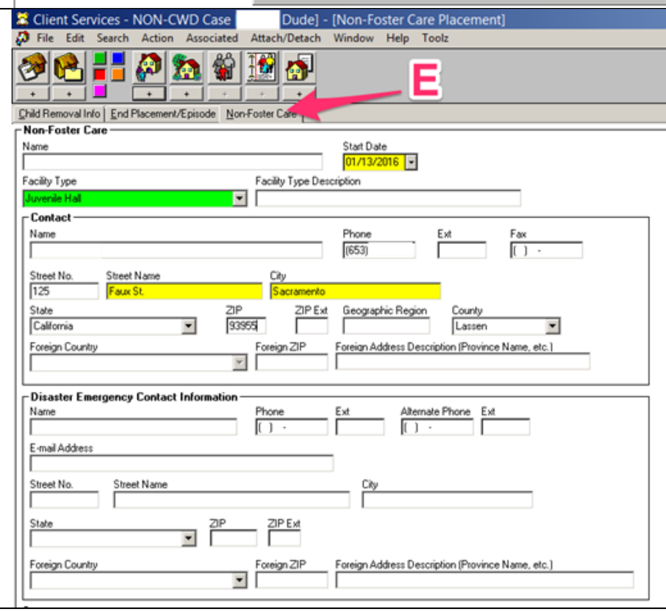
Ending a Placement Prior to Creating a New Placement

Note: Prior to creating a new placement you will need to close out the existing placement by completing the following steps in the open case.

A. Click the Red Placement Management Section.	
B. Open Existing placement. Click on the first icon/notebook to the right of the colored section for "Open Existing Placement."	
C. A New Window Appears with all your placements. Highlight the placement you want to update and click OK.	
D. Click on the "Ongoing Requests" tab.	
E. Highlight the Payment Type (ie Basic or Additional) and enter a Stop Payment date for each type.	
F. Click the End Placement/Episode Tab	
G. Choose a placement change reason (i.e. Child Ran Away from Placement)	
H. Enter a Placement End Date and Click "Yes" to the message window that appears.	

(SAVE TO DATABASE) *if your work is completed or begin a new Foster or Non-Foster Care Placement. The placement notebook becomes read only. If any changes need to be made, go to the "Action" drop down menu and click on "Update Placement."*

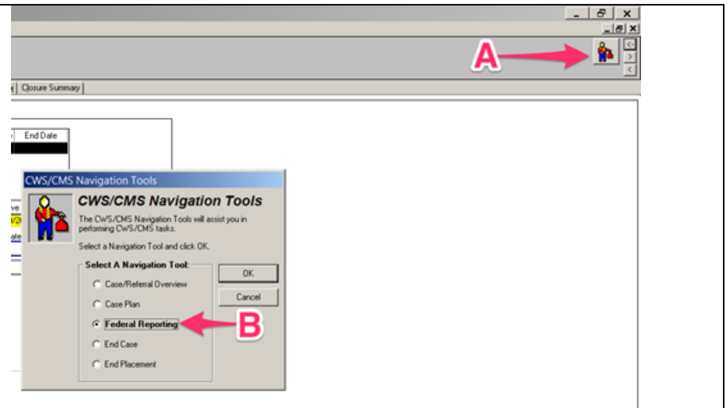
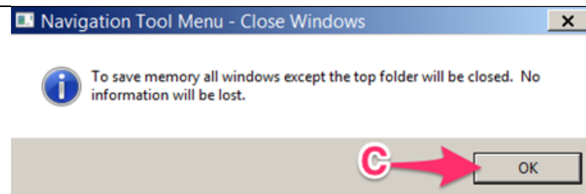
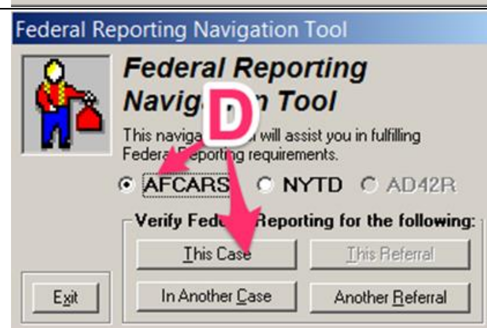
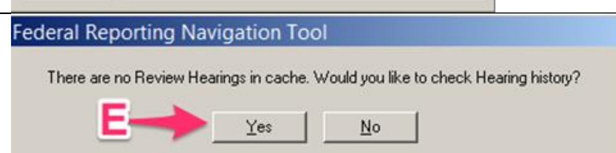
Creating a Non-Foster Care Placement

<table>
<tr><td>A. Click on the Red Placement Management Section</td><td rowspan="4">
</td></tr>
<tr><td>B. Click on the plus sign under the first Icon/Notebook to Create New Placement</td></tr>
<tr><td>C. Highlight your Youth's Name in the Window that Appears</td></tr>
<tr><td>D. Click on the Non-Foster Care Button.</td></tr>
<tr><td>E. Click on the Non-Foster Care tab and complete all Yellow and Green fields as shown in the sample Screen Shot. (Note: The date field on this page will default to the date you input on the End Placement/ Episode tab. Be sure to change it to the correct date if for example your youth was AWOL for a period of time prior to being placed in Juvenile Hall).</td><td>
</td></tr>
</table>

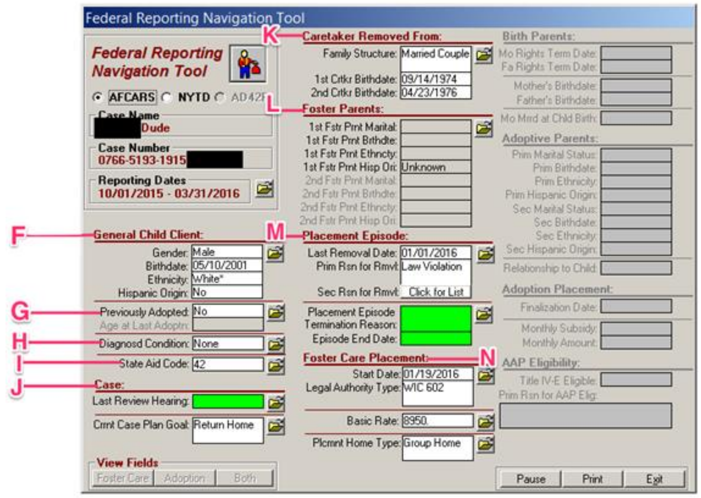
(SAVE TO DATABASE)

Federal Compliance with AFCARS (Adoption Foster Care Analysis-Reporting System)

Note: Check your federal reporting compliance tool after completion of each change of placement to assure your compliance is up to date with the current reporting period. Reporting periods are bi-annual October – March and April –September.

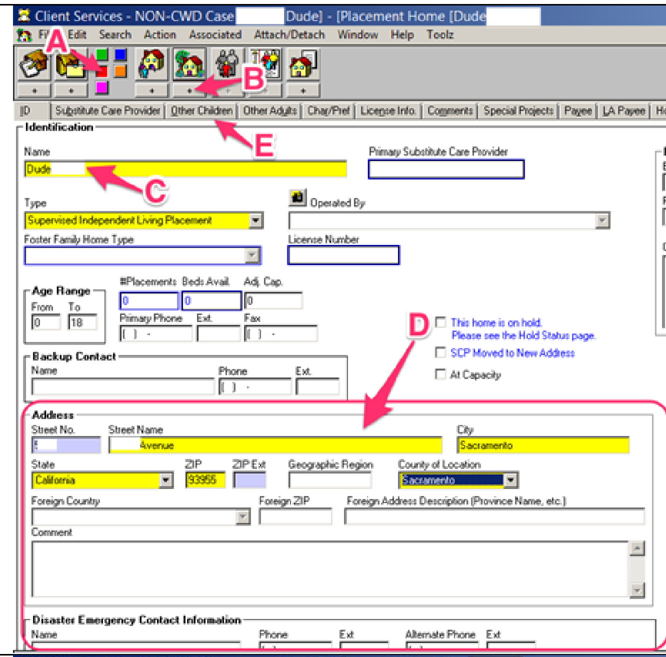
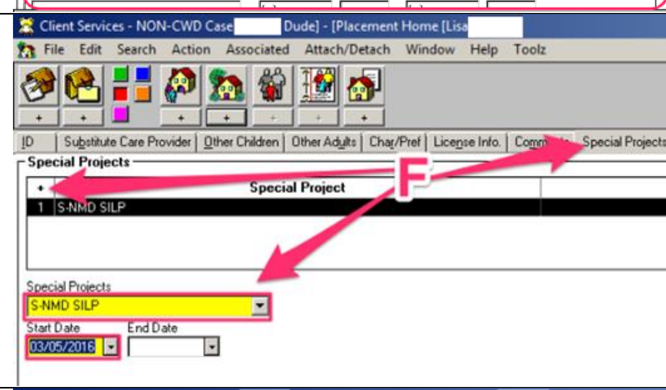
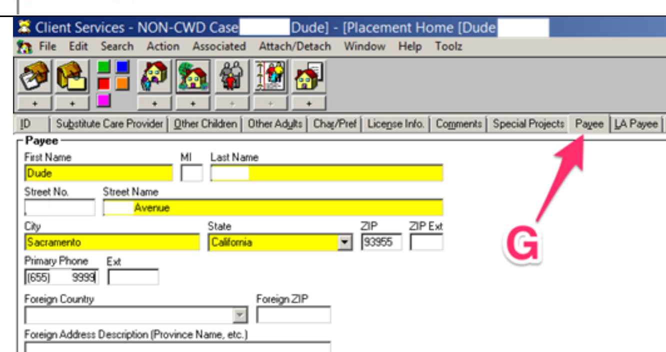
A. Click the Tool Man	
B. Click Federal Reporting and Click OK	
C. Click OK to the message that appears	
D. Choose the AFCARS radio button and Click "This Case."	
E. Click Yes to the question of checking review hearings in Cache. *Note: Green Fields in AFCARS denote non-compliance except as follows; Last Review Hearing if the case has not yet been open six months and therefore no review hearing has yet been documented, and Placement Episode Termination Reason which is completed only upon closing the case in CWS/CMS. The foster parent field may also be green and not "out of compliance" depending on the current placement type.*	

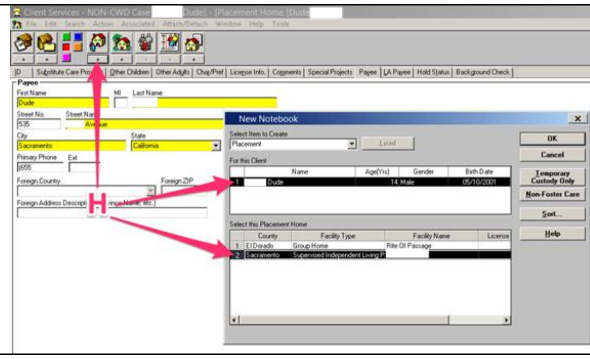
F.	**<u>General Child Client:</u>** This section is updated as follows: Gender through Hispanic Origin – documented in the youth's client notebook (Blue Section, first icon/notebook, open existing client.
G.	**<u>Previously Adopted:</u>** "Demog" page in client notebook.
H.	**<u>Diagnosed Condition:</u>** Health Notebook (Blue section, open existing health notebook)
I.	**<u>State Aid Code:</u>** Entered in Youth's client notebook (Blue section, open existing client, ID NUM page tab.
J.	**<u>Case:</u>** This section is updated on the Non-CWD tab in the Red Section (First Icon/Notebook, open existing placement)
K.	**<u>Caretaker Removed From:</u>** Family Structure is documented on the Child Removal Tab in the Red Section, open existing Placement Icon/Notebook.
L.	**<u>Foster Parents:</u>** When creating a THP+FC home this information is found on the Substitute Care Provider tab in the Red section, second Icon/Notebook for open existing Placement Home.
M.	**<u>Placement Episode:</u>** Last Removal Date, Primary Reason for Removal and Secondary Reason for Removal are all documented in the Red Section, first Icon/Notebook for open existing Placement on the Child Removal Tab. (Placement Episode Termination Reason is documented on the End Placement/Episode tab in the existing placement notebook.)
N.	**<u>Foster Care Placement:</u>** Start Date and Legal Authority are documented on the ID tab of the current placement notebook in the Red Section. Basic Rate is documented on the Ongoing Request Tab.



Creating a Foster Care SILP (Supervised Independent Living Placement) Home and Placement

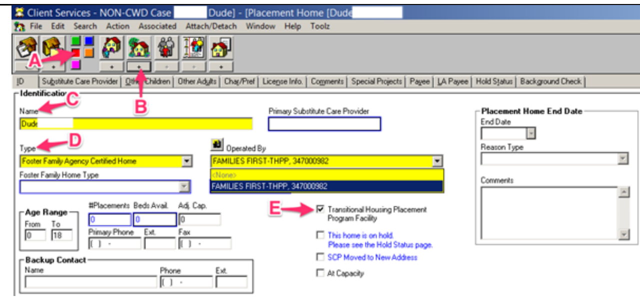
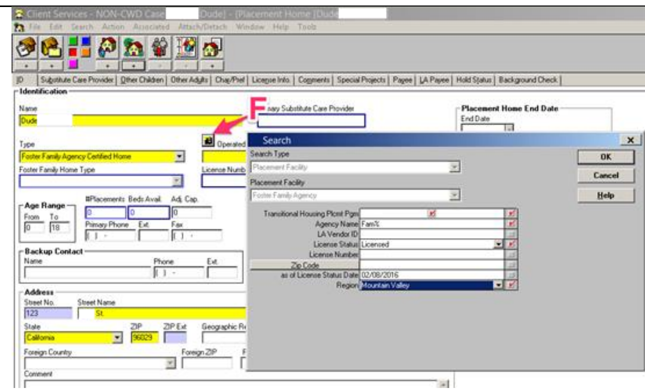
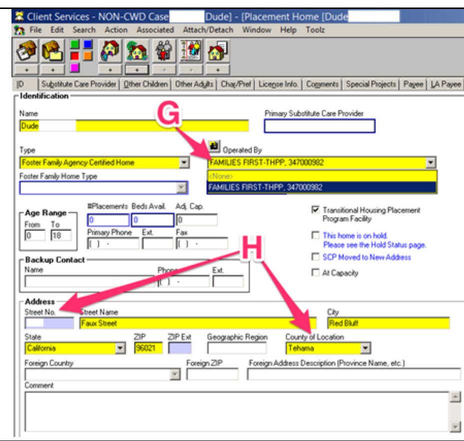
*Note: Before you can create a SILP **Placement** you must first create the SILP **Home** following the directions below.*

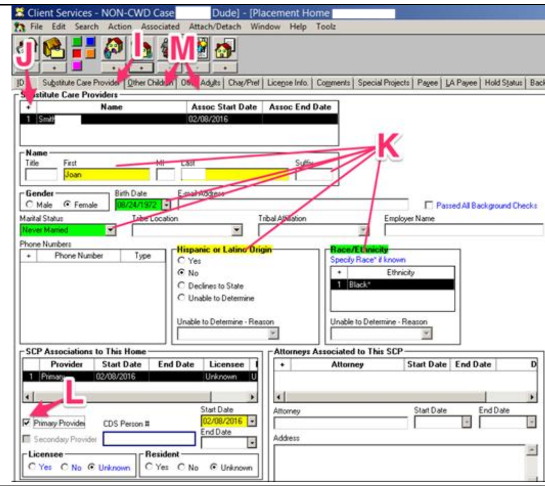
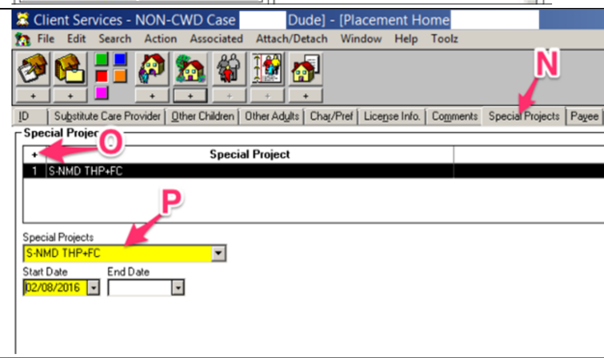
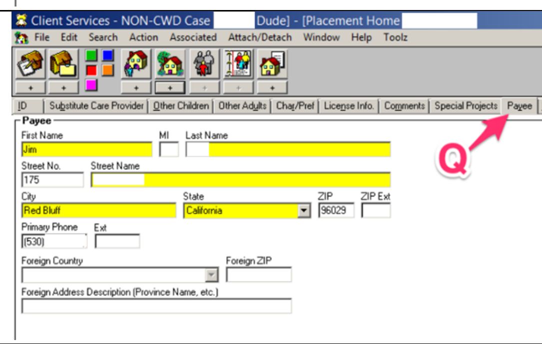
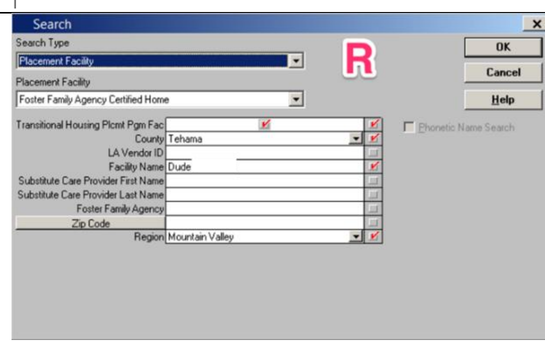
A. Click on the Red Placement Management Section	
B. Click the plus under the second Icon/Notebook for "Create New Placement Home."	
C. Enter your Youth's name in the "Name" field	
D. Enter the address and phone number where your youth resides.	
E. If other adults or children live in the home enter them on the "Other Children" and "Other Adults" tabs otherwise skip this step.	
F. Click on the Special Projects page. Click the plus under Special Projects to activate the fields. Choose S-NMD SILP from the drop-down menu and enter a start date.	
G. Click on the "Payee" tab and enter the payee information (i.e. name, address, and phone number)	

H. Click the plus sign under the first house icon/notebook to "Create New Placement." You will see the SILP home you just created. Highlight your youth's name and the SILP home from the open window and **proceed with steps K-R of Creating a New Foster Care Placement. Pages 11-12 in this guide.**	

(SAVE TO DATABASE)

Creating a THP+FC Placement Home and Placement

<table>
<tr><td>A. Click on the Red Placement Management Section.</td><td rowspan="5">
</td></tr>
<tr><td>B. Click on the + sign under the second house icon/notebook for create new placement home.</td></tr>
<tr><td>C. Name the home. Follow your county’s rule for naming convention i.e. Test Child in a Families First placement might be Test Child FF. (note: Remember the exact name you called the home including any spaces or hyphens. This will help you locate the home in your search to complete the placement.)</td></tr>
<tr><td>D. Choose the “Type” of home “Foster Family Agency Certified Home.”</td></tr>
<tr><td>E. Click the check box for “Transitional Housing Placement Program Facility.”</td></tr>
<tr><td>F. Click the “Operated By” search binoculars and complete search criteria to find the agency your home is attached to. Choosing Licensed, Region or Zip Code, or use of your wildcard like this “Fam%” in the facility name field are all helpful search tips. (note: It may appear like your search yielded no results. Check the dropdown menu and you will find your results. If no results found it is possible your social service agency hasn’t yet entered the home in the system. Contact them for assistance with locating the agency.)</td><td>
</td></tr>
<tr><td>G. Locate the agency you just searched for in the dropdown yellow field under the “operated by” search binoculars.</td><td rowspan="2">
</td></tr>
<tr><td>H. Complete the address fields (note: County field defaults to your county. Be sure to change it to the correct county associated with the city of the home your youth resides in. You will need to recall the county you entered when searching for this placement home to complete the placement of your youth.)</td></tr>
<tr><td>I. Click on the “Substitute Care Provider” page tab.</td><td rowspan="2"></td></tr>
<tr><td>J. Click the plus under “Substitute Care Provider” on the open page to activate the yellow and green fields.</td></tr>
</table>

K. Complete all yellow and green fields with as much information as you have. *(Note: Follow your county's naming convention for the SCP "substitute care provider.")*	
L. Check the "Primary Care Provider" box in the box titled "SCP associations to this home." *(Note: the start date in this box will default to the current date. Change it to the correct date if necessary.)*	
M. If there are other adults or children in the home, complete the page tabs for them.	
N. Click on the "Special Projects" tab.	
O. Click on the plus under "Special Projects to activate the fields on this page.	
P. Click on the dropdown menu under "Special Projects" and choose S-NMD THP+FC. *(Note: You must have the "Resource Management Placement Facility" privilege assigned to you to complete this entry.)*	
Q. Click on the "Payee" tab (Complete payee information using your county's naming convention.)	
R. Search for the placement home you just created using the County, Facility Name, and Region you recall from the ID page you completed for the placement home.	

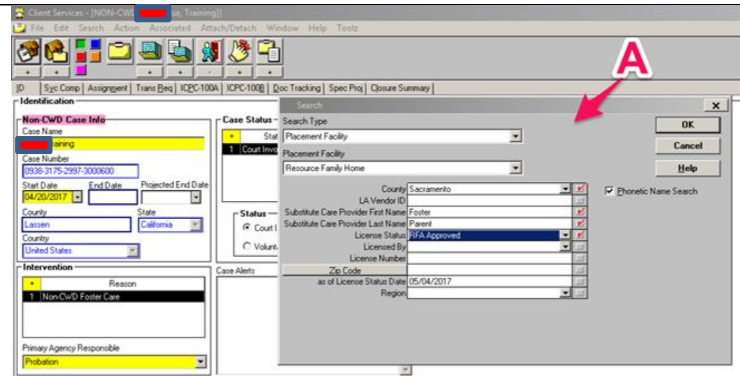
Save to database, re-open the case, and search for the placement you just created.

Complete placement by following steps G-R of creating a foster care placement. **See pages 10-12** in this guide.

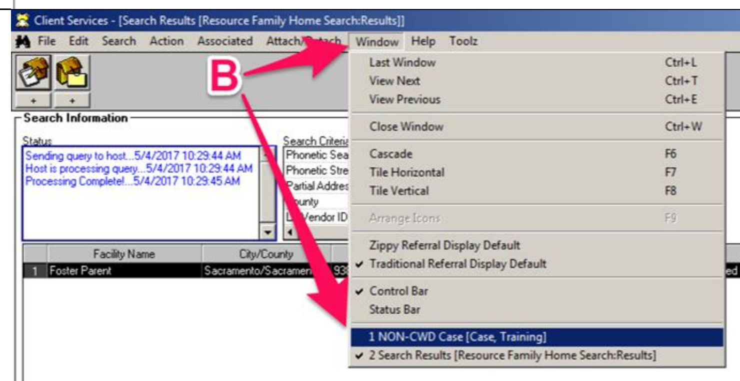
(SAVE TO DATABASE)

Creating a Resource Family Home Placement

A. Search for the RFH home using the search criteria in the screenshot and click OK.



B. From your search results screen click on the window drop-down menu and click on the Non-CWD window to get back to your open case.



C. Click on the Red Placement Management Section.

D. Click the plus sign under the house icon (the one with the people standing in front of it) for create new placement.

E. From the open window, highlight your youth's name.

F. Highlight the placement home.

G. Click OK and continue instructions as noted below.
Note: If this is the first placement home you're entering for your youth, ***complete instructions C-R*** *in this guide for Creating a Foster Care Placement. If this is not the first placement* ***complete instructions K-R*** *for Creating a Foster Care Placement.* ***See Pages 10-12*** *in this guide.*