N-FOCUS NAVIGATION GUIDE

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CASE REGISTRATION

Person Search

1. From the N-FOCUS *Main Menu*, select the *Person Search* icon.
2. Enter last name and first initial of the person in whose name the Master Case is to be established.
   Note: You may also enter the SSN to perform a search for a Person.
3. Select the *Search* push button.
4. If there is not a match, proceed to Step 7.
   (OR)
   If there appears to be a match, compare your person data with that of the person who appears to match. Select (highlight) that person.
5. Select the *Open* icon.
6. Review the details of this person to assist in determining if he/she is a match. For example, you may want to select the *Address* push button to determine if the address is a match.
7. Select the *Close window* icon.
8. Select the *Cancel* push button.

Create a New Master Case and Program Case

1. From the N-FOCUS *Main Menu*, select the *Master Case* icon.
2. Select the *New* push button.
3. On the *Add Person* window, enter all available data such as the Master Case Person's full name (including extensions), Sex, SSN, Birth Date, Ethnicity, and Race.
4. Select the *Person Clearance* push button.
5. On the *Person Clearance List* window, compare your person's data with that of the person who appears to match.
6. If you determine that there is not a match, highlight the name of the new person and select the *Add New Person* push button.
7. If there is a match, highlight the name of the matching person and select the Use *Existing N-FOCUS Person* push button.
8. Select the *Yes* push button.
9. Enter all address data.
10. Select the *OK* push button.
11. Enter all appropriate telephone numbers.
12. Select the *OK* push button.
13. On the *New Programs* window, select (highlight) each program in which the Master Case Person is participating.
14. On the *Children and Family Services Case* dialog box, enter the Case Begin Date.
15. Select the *OK* push button.
16. Enter the information regarding Interpreter and Language.
17. Select the *OK* push button.
18. Select *Yes* if you want to add another person to the Program Case.

19. Enter the additional person's available data such as person's full name (including extensions), Sex, SSN, Birth Date, Ethnicity, and Race.
20. Select the *OK* push button.
21. On the *Person Clearance List* window, compare your person's data with that of the person who appears to match.
22. If you determine that there is not a match, highlight the name of the new person and select the *Add New Person* push button.
23. Select the *Yes* push button.
24. Select (highlight) the Program Case(s) to which you want to add the person.
25. Select the *New Programs* push button to add a Program Case not already listed in the *Existing Cases* group box.
26. On the *New Programs* window, highlight any new program for which the second person in this Master Case applies and answer the pop-up window questions.
27. After you have entered information (if necessary) on the dialog box, select the *OK* push button.
28. Select the *OK* push button.

Add a CFS Program Case to an Existing Master Case

(If there is already a CFS case, reopen it, don't create a new one)

1. Navigate to the *Detail Master Case* window.
2. Highlight the parent name from the *Master Case Persons* group box.
3. Select the *Actions* menu.
4. Select Add Program Case.
5. Highlight the Children and Family Services option.
6. Enter the Case Begin Date.
7. Select the *OK* push button.
8. Select the *OK* push button.
9. Select (highlight) the Program Case Persons who will be in the CFS Program Case.
10. Select the Program Case Name from the drop-down list box.
11. Select *OK*.
12. Enter the information regarding Interpreter and Language.
13. Select the *OK* push button.
14. Select *OK.*
15. Assign the Program Case to the appropriate staff
16. On the *Master Case* window select *Actions – Family Relationships*.
17. Verify that the information is accurate. If not, contact SSW assigned to the other Program Cases to discuss changes.

Re-open a CFS Program Case

1. On *Detail Master Case* window, open the closed CFS Program Case.
2. Select *Actions*.
3. Select *Reopen Program Case*.
4. Enter the information.

Close a CFS Program Case

1. On *Detail CFS Program Case* window, select *Actions*.
2. Select Reopen Program Case.
3. If you get a pop-up window, it will tell you there are functions still needing to be completed. You will need to complete these before you can close the case or if you don't get a pop up window, move to the next step.
4. Enter the date to close the case. It will go to the end of the month and if it's past a cutoff date, it will prompt you to enter next month's date.

Add Person to Master Case

1. On *Detail Master Case* window, highlight Person's Name.
2. Select Actions, Add person to Master Case.
3. Enter the information.

Change Master Case Household Status

1. On *Detail Master Case* window, select the *Household Status* icon.
2. Highlight the person's name you want to change.
3. Select Actions, Change Household Status.
4. Chose the appropriate radio button and enter the Effective Date.
5. Select the *OK* Button to return to the *Household Status* window.
6. Close the window.

Add Person to Program Case

1. On *Detail Master Case* window, highlight the person you want to add.
2. Select Actions, Add Person to Program Case.
3. Enter information.

Change Program Case Name

1. Highlight the Program Case whose Program Case Name you wish to change.
2. Enter the information regarding Interpreter and Language.
3. Select the *OK* push button twice.

Assign yourself to a Program Case

1. On *Detail Master Case* window, highlight CFS Program Case and Open.
2. On *Detail CFS Program Case* window, select *Assignments* icon.
3. Select Actions, Assign Office Position.
4. Enter Log on ID or search for person.
5. *Blue arrow* back the name of the worker if there is a list window.
6. If you are not the Primary Worker, the *Worker Role* window will appear. Select the radio button for your position.
7. Select *OK*.
8. Close the window.

PROGRAM PERSON

Change Ward Status

1. On *Detail Program Case* window, highlight the child.
2. Select *Program Person* push button.
3. Highlight appropriate Legal Status from drop-down list.
4. Enter the County.
5. Complete the Characteristics.
6. Enter any other additional information.
7. Save & Close.

Enter Person (State Ward) Characteristics

1. On *Detail Program Case* window, highlight the child.
2. Select *Program Person* push button.
3. Select *Characteristics* push button.
4. Select Characteristics from list box
5. Use right click mouse button to mark Yes/No, leave blank to make it undetermined.
6. Save & Close.

Update Person (State Ward) Characteristics

1. Repeat steps 1-4 above.
2. Right click on the Characteristic and change the answer.
3. Save and Close.

Court Report-Person Narrative for State Ward

1. On *Detail Legal Actions* window, highlight child from *Participants* group box.
2. Select *CFS* icon.
3. Select *Narrative* icon.
4. Highlight Subject Area Court Report Person.
5. Select *New* and complete the narratives.
6. Save & Close.

Child Disclosure Narrative

1. On *Detail Program Case* window, highlight the child.
2. Select *Program Person* push button.
3. Select the *Narrative* icon.
4. Select the Subject Area: Child Disclosure.
5. Select New.
6. Enter the narratives.

PERSON DETAIL

Navigate to Person Detail from the Main Menu

1. From the *N-FOCUS* main menu, select the *Person Search* icon.
2. Enter the appropriate search criteria.
3. Select the *Search* push button.
4. If there is only one person with this name, you will be taken directly to the *Person Detail* window.
5. If there is more than one person with this name or a similar spelling, you will be provided a list. Highlight the person you want, select the blue arrow.
6. Select *Search*.

Navigate to Person Detail from the Master Case or Program Case

1. On the *Detail Master Case* window, either double-click on the person for which you want to see details
   OR
   Select (highlight) the name of the person from the *Master Case Persons* list box and select the *Person* icon.

Add Person Detail Data for a Master/Program Case Person

1. Enter Social Security number for the person.
2. Enter Birth Date of the person.
3. Select *Sex* indicator.
4. Save by using the *Save* or *Save and Close* icon.

Add Demographic Data for Each Master Case Person

1. Navigate to the *Person Detail* window.
2. Select the *Demographics* push button.
3. Select whether an Interpreter is needed from the group box.
4. Select Ethnicity.
5. Select Race.
6. Select the Primary Written Language from the drop-down list.
7. Select the Primary Spoken Language from the drop-down list.
8. Select *OK*.
9. Select Save or Save and Close icon.

Entering Pregnancy Data

(Check with your supervisor before updating pregnancy information as there are requirements involved)

1. Navigate to the *Person Detail* window.
2. Select the *Add Pregnancy* push button.
3. Enter the Expected Delivery Date.
4. Enter the expected Fetal Number for the unborn child.

5. Enter the Verification Source from the drop-down list box.
6. Select the *OK* push button.
7. Select *OK*.
8. Select the *Save* or *Save and Close* icon.

Update Pregnancy Data

1. Navigate to the *Person Detail* window.
2. Select the *Demographics* push button.
3. Select the *Update Pregnancy* push button.
4. Change Expected Delivery Date if necessary.
5. Change Fetal Number if necessary.
6. Change the Verification Source if necessary.
7. Enter the End Date.
8. Select the End Reason from the drop-down List.
9. Select *OK*.
10. Enter baby's name and sex.
11. Select *OK*.
12. Select *OK*.
13. Select Save and Close.

Add or Update Telephone Number for Each Person in the Master Case

1. Navigate to the *Person Detail* window.
2. Select the *Telephone* push button.
3. Enter the telephone number(s).
4. Select *OK*.
5. Select *Save.*

Update Address for Each Person in the Master Case

**(If the family has any EA cases, check with the SSW before changing an address)

1. Navigate to the *Master Case* window.
2. Select a person in the *Master Case Persons* group box.
3. Select the *Person Detail* icon or double click on the name.
4. Select the *Address* push button.
5. Update all address data changes.
6. Select the *Directions* push button to enter directions to the person's address.
7. Enter the directions to the address.
8. Select *OK*.
9. Select *OK*.
10. On the *Multi-Select Physical Address* window, select (highlight) the other people who should have the same address as the person listed at the top.
11. Click on the *Update Address* push button.
12. Select the *Save and Close* icon.
13. Select Save or Save and Close.

View Address History

1. Navigate to the *Person Detail* window.
2. Select the *Address History* push button.
3. Select *OK* to return to the *Person Detail* window.

View the Program Cases in which the Person is a Participant

1. Navigate to the *Person Detail* window.
2. Select the *Program Cases* push button.
3. Select *OK* to return to the *Person Detail* window.

Enter/Update Name History

1. Navigate to the *Person Detail* window.
2. Select the *Name History* push button.
3. Select the *New* icon.
4. Enter the Name, Begin Date, and Name Type.
5. Select *OK*.
6. Select the *Close window* icon.

Create Professional Relationships (not associated with the CFS case)

1. Navigate to the *Person Detail* window and select the *Professional Relationships* icon.
2. On the *Professional Relationships* window, the case person's name pulls over automatically. Select the black select arrow to pull in a professional.
3. On the *Person Search* window, enter the person's name and select the *Search* push button.
4. One of two things happen:
   A list window displays: highlight the person you are searching for and select the blue select arrow.
   OR
   The professional's name pulls into the *Professional Relationships* window.
5. Select the Relationship Type from the drop down menu.
6. Enter the date the relationship began in the *Begin Date* field.
7. Select the *Save and Close* icon.

End a Professional Relationship (not associated with the CFS case)

1. On the *Person Detail* window, select the *Professional Relationships* icon.
2. The *List Professional Relationships* window displays with a list of the professionals involved with this person. Double click on the professional who's relationship is ending with this person.
3. In the *End Date* field, enter the date this relationship ended.
4. Select the *Save and Next* icon to create a new relationship
   OR
   Select the *Save and Close* icon to exit.

SCHOOL ATTENDANCE

Add School Attendance

1. Navigate to the *Person Detail* window.
2. Select the *School Attendance* push button.
3. Select the *New* icon. (Green Sheet of Paper)
4. Click on the black out select arrow to search for the Appropriate School location.
5. Enter the search criteria and click on the *Search* push button.
6. Highlight the desired Organization and click on the blue return select arrow.
7. Enter information in the remaining fields to meet the individual circumstances.
8. Enter information in the Special Education fields as appropriate.
9. Select the *Save and Close* icon.
10. Select the *Close* icon.

View School Attendance

1. Navigate to the *Person Detail* window.
2. Select the *School Attendance* push button.
3. Select (highlight) the School Attending, and open.
4. To exit the *Detail School Attendance* window, select *Close* icon.
5. Select the *Close* icon to return to the *Detail Person* window.

End Dating School Attendance

1. Navigate to the *Detail School Attendance* window.
2. Select the appropriate Attending Status from the drop-down list.
3. Enter the last day of attendance in the *End Date* field.
4. Select Save.

TRIBAL AFFILIATION

View Tribal Information

1. Navigate to the *Person Detail* window.
2. Select the *Tribal* push button.
3. Double click on the Tribe you want to view.

Add Tribal Information

(You can add more than one tribe, just repeat these steps for each tribe)

1. Navigate to the *Person Detail* window.
2. Select the *Tribal* push button.
3. Select the *New* icon. (Green Sheet of Paper)
4. Select the black out select arrow.
5. Select the appropriate Region from the drop-down list.
6. Highlight the Tribal Name on the *Tribal Name* List.
7. Select *OK*.
8. Answer the question regarding the child's status with the Tribe.
9. Answer the question regarding ICWA.
10. Select the *Save and Close* icon.
11. Select the *Close* icon.
12. Select Save or Save and Close.

Update Tribal Information

1. Navigate to the *Person Detail* window.
2. Select the *Tribal* push button.
3. Highlight the Tribe Name you wish to update.
4. Select the *Open* icon or double click.
5. Make the appropriate changes to the questions.
6. Select the *Save and Close* icon.
7. Select the *Close* icon.
8. Select Save or Save and Close.

Delete Tribal Information

1. Navigate to the *Person Detail* window.
2. Select the *Tribal* push button.
3. Highlight the Tribe Name you wish to delete.
4. Select the Actions Menu - Delete.
5. Select *Yes* in the confirmation box.
6. Select the *Close* icon.
7. Select Save or Save and Close.

NARRATIVES

Search Narratives

1. Select the *Narrative* icon.
2. Highlight the narrative subject.
3. Select the *Search* push button.
4. If narratives have already been created, you will be provided with a list of narratives to choose from. If only one narrative exists, that one narrative will appear.
5. If no narratives have been created, a pop up will appear stating this.
6. Double click on the narrative you want to view.

Create New Narratives

1. Select the *Narrative* icon.
2. Highlight the narrative subject.
3. Select the *New* push button.
4. The *Detail Narrative* window displays with a blank text area. Select the item type, enter the correct Occurrence Date, and enter the narrative.
5. Either select the *Save and Next* icon and enter another narrative or select the *Save and Close* icon.

Save Narratives

Note: You are provided 3 *Save* options on the *Narrative* window:

Save (This icon will save the current narrative)

Save and Close (This icon will save the current narrative and take you back to the previous window).

Save and Next (This will save the current narrative and move you to the next).

Finalize Narratives

Note: When a narrative is entered, its status is Draft. When in Draft status, anyone can make changes to the narrative. It is best practice to Finalize narratives once they are entered. They are also automatically finalized after 30 days.

Finalize a single narrative:

1. On the *Detail Narrative* window, select Actions, then select Change Status to Final.
2. You will receive a *Confirmation* pop-up. Select *OK* to Finalize.
3. The status will change from Draft to Final. You will not be able to use the *Save and Close*/*Save and Next* icons once the narrative is finalized.

Finalize more than one narrative:

1. After entering narratives, highlight the Subject Area(s) you want to search for narratives.
2. The *List Narrative* window will appear with a list of narratives.
3. Highlight the narratives you want to finalize. Go to Actions and Change Status to Final.
4. You will receive a confirmation window. Select *OK* to finalize.
   Note: Narratives in Final Status can be changed back to Draft Status by your supervisor.

Program Case Narratives

1. On the *Detail Program Case* window, select the *Narrative* icon.
2. Following is a list of the most common Subjects under this *Narrative* icon:
   - Contacts (NOT Required Contacts) - This documentation is regarding general contacts (home visit, phone calls, correspondence, other visits)
   - Consultation Point
   - Family Team Meeting
   - Contractor Specific (This is where Contractors document initial 24 hour contact and Aftercare)

Required Contact Narratives

1. On the *Detail Program Case* window, select the *Multi-Person* icon.
2. Select the people for which you want to document a required contact.
3. Select *Required Contacts* in the bottom box.
4. Select the *New* push button.
5. Enter the narratives. (Refer to the Job Aide section of the N-FOCUS book for more details)
6. Save the information.

Court Report-Person Narratives for State Ward

See section under PROGRAM PERSON

Child Disclosure Narratives

See section under PROGRAM PERSON.

Court Report-Case Narratives

See section under LEGAL ACTIONS/COURT REPORT.

Kinship Narratives

Kinship Narratives are started in the IA process. Any and all information should be documented, including attempts to locate and any possible identifying information. There are four narratives:

- *Non-Custodial Parent*: document any information pertaining to the NCP.
- *Paternal Relatives*: document any information pertaining to the father's relatives.
- *Maternal Relatives*: document any information pertaining to the mother's relatives.
- *Indian Child Welfare Act*: document what the caregiver stated about any tribe affiliation. Do not type N/A. You must type what they stated.

Create New Kinship Narratives

The *Kinship Narrative* icon can be found on the *Detail Safety Assessment* window and the *SDM Household Summary/Detail* window.

1. Navigate to either the *Detail Safety Assessment* window or the *SDM Household Summary/Detail* window and select the *Multi-Person* icon.
2. Select the people for which you want to document a kinship narrative.
3. Select *Kinship Narratives* in the bottom box.
4. Select the *New* push button.
5. Select the Item type (see above list), enter the Occurrence Date, enter the narrative.
6. Select the *Save & Next* icon and the next *Narrative* item displays.
7. Repeat the steps for all the *Narrative* items.
8. After all the narratives have been entered, select the *Save & Close* icon and the *Search Multi-Person Narrative* window displays.
9. Select the *Search* push button to view narratives you've entered.
10. Change the status of the narratives to Final by highlighting the narratives, selecting *Actions*, *Change status to final*, and answering yes to the confirmation pop-up.
11. The status has been changed to Final, now close back to the *Detail Safety Assessment* window.

Update Kinship Narratives

Throughout the life of a case, *Kinship Narratives* are updated as new information becomes available about family members.

1. Navigate to either the *Detail Safety Assessment* window or the *SDM Household Summary/Detail* window and select the *Kinship Narrative* icon.
2. On the *Search Kinship Narrative* window, select the person(s) for which you want to update information and select the *New* push button.
3. On the *Kinship Narrative* window, select the *Narrative Item*, enter the *Occurrence* date if it's different than today's date, and enter the narrative.
4. Select the *Save and Next* icon to add an additional narrative and repeat the above step

   OR

   When all narratives have been entered, select the *Save and Close* icon to save the information and close out of the window.

Add/Remove a Person

You can add a person to the *Kinship Narrative* window by selecting the *Add* push button and adding in a person.

You remove a person from the *Kinship Narrative* window by highlighting a person's name and select *Remove* push button.

SDM HOUSEHOLD

Create a New SDM Household

1. Navigate to the CFS *Detail Program Case* window.
2. Select the *SDM* icon to display the *SDM Household Summary/Detail* window.
3. Select the *New* icon (green sheet of paper) and the *SDM Household Detail* window displays with the *Program Case Persons* listed.
4. In the *Referral Date* field, enter the date the intake was accepted.
5. Select (highlight) the person who is the primary caregiver, enabling the *Primary Caregiver* push button.

   Note: The *Household Name* push button will only be used when there is no Primary Caregiver.
6. Select the *Primary Caregiver* push button and the name selected will now display in the lower group box with the Role of Primary Caregiver. This person will also display as the Household Name.
7. If the household has a secondary caregiver, select the name of the Secondary Caregiver enabling the *Secondary Caregiver* push button.
8. Select the *Secondary Caregiver* push button and the name will display in the lower group box with the Role of Secondary Caregiver.
9. Select the person(s) who are children, enabling the *Child* and *Other* push buttons.
10. Select the *Child* push button and the name(s) selected will now display in the lower group box with the Role of Child.
11. If there are other people in the household and they are listed in the *Program Case Persons* box, highlight their names and select the role of Other by selecting the *Other* push button.
12. If no additional names are to be added, select the *Save and Close* icon.

Add Additional People to the Household

If there are additional people in the household but not listed in the *Program Case Persons* box, they will need to be added to the household.

1. Navigate to the *Detail SDM Household* window select the *Search Person* out select arrow and the *Person Search* window displays.
2. Enter at least the last name of the person you want to be added and select the *Search* push button.
   a. If the person is found, continue below with selecting the role.
   b. If the person is not found in N-FOCUS, the *"Person Not Found"* pop-up will display. Click *OK* and then the *Cancel* push button. The *SDM Household Detail* window displays with the message asking if you'd like to add a new person. Select *Yes* and continue with the steps.
3. After adding the new person, the *SMD Household Detail – Update Role* pop-up displays. Select the Role of that person.

4. The new name will display in the lower group box with the Role selected. Repeat to add additional people. After all people have been added, select the *Save & Close* icon to return to the *SDM Household Summary/Detail* window.
5. The *SDM Household Summary/Detail* window displays with the Household Name information listed in the upper group box. Select the household name to view the household information in the lower group box.

Changes to a Household Person

- Select the *Add* push button to display the *Detail SDM Household* window to add a person.
- Select the *Update* push button to update the Role of the person.
- Select the *Remove* push button to remove a person from the household.
- Select the *End Date* push button to end date the person's involvement in the household.
- Select the *History* push button to display the history of this person in the household.

Note: If an assessment is not in final status, N-FOCUS will not allow any changes to be made to the current household.

Add an Additional Household

1. On the *SDM Household Detail* window, select the *New* icon (green piece of paper).
2. Follow the steps listed under "Create a New Household."
3. As a result, you will have more than one household listed in the *Household Name* box.

Change the Status of an SDM Household

When a case transfers or closes, the status of the household must be updated.

1. On the *SDM Household Summary/Detail* window, highlight the household to be updated.
2. Select the *Status* push button.
3. Select the appropriate *Status* and select *OK* and the *Status* is updated.

SDM SAFETY ASSESSMENT

Create the Initial SDM Safety Assessment

1. From the *Detail Program Case* window, select the *SDM* icon to display the *SDM Household Summary/Detail* window.
2. Select (highlight) the appropriate Household Name in the group box to enable the assessment push buttons. If a household isn't listed, one must be created.
3. Select the *Sfty Asmnt* push button.
4. On the *Detail SDM Safety Assessment* window, in the *Assessment Date* field, enter the date the assessment started.
5. Assign yourself to the assessment by:
   a. Selecting the *Completed By* out select arrow
   b. On the *Search Office Position* window, enter your Staff Person Logon
   c. Select the *Search* push button and your name and office is pulled into the safety assessment
6. If applicable, tie the Intake for which you are completing the assessment by selecting the *Intake* black select out arrow.
   a. On the *Search Intake* window, enter the Intake Number (top left) of the intake you want to tie to this safety assessment.
   b. If you do not have the intake number, in the *Person* box, select the select out arrow, enter at least the Last name of the intake and select *Search.*
      - If N-FOCUS only finds one name like this, the name is pulled into the *Search Intake* window.
      - If more than one name is found by N-FOCUS, a list will display; highlight the name of the family and select the blue arrow (top left of the window).
   c. The family's name is pulled into the *Search Intake* window. Select the *Search* push button to search for intakes relating to this person.
   d. On the *List Intake* window, highlight the intake to be tied and select the blue arrow to pull it into the assessment.
7. A pop-up will display asking if you want this intake tied to the assessment. Select *Yes* to tie it. The intake has been tied when the *Intake* icon (blue phone) is enabled. If the intake includes allegations, the *Allegation* icon (red phone) will also enable.
8. Select the *Save* icon and the *Child Vulnerabilities, Safety Threat, Contact Detail* and *Status History* push buttons enable.

   Note: If you didn't tie and intake, you will receive a pop-up; Proceed accordingly.
9. Select the *Child Vulnerabilities* push button and the *SDM Safety Assessment-Child Vulnerabilities* window displays.
10. Select the vulnerabilities as they relate to the most vulnerable child in the home.

    Note: If 'Other (Specify)' is selected, you must enter text in the text box and select TAB on the keyboard to enable the *OK* push button.

11. Select the *Narrative* push button and enter describe why these were chosen.
12. Select the *Save and Close* icon.
13. Select the *OK* push button to return to the *SDM Safety Assessment* window.
14. Select the *Safety Threat* push button and the *SDM Safety Assessment-Safety Threats* window displays.
15. Select all applicable safety threats in the list.
    a. If no safety threats apply, select the *No Safety Threats* push button at the bottom
    b. If either of the safety threats "Caregiver caused serious…" or "Child shows signs of significant…" is selected, a subsequent description listed under it must also be selected
    c. If 'Other (Specify)' is selected, you must enter text in the text box and Tab out
16. Select the *Narrative* push button.
17. Enter a description of how the threats are or aren't active in the home.
18. Select the *Save and Close* icon.
19. When done, select the *OK* push button to return to the *Detail SDM Safety Assessment* window.
20. Enter the dates of the contacts with the family by selecting the *Contact Detail* push button, displaying the *Contact Detail* window.

    Note: Contact Detail is required to be completed if an Intake has been tied to the Safety Assessment and reflects whether or not the priority response time was met.
21. For each person:
    a. Select a name from the *Person* drop-down list.
    b. If appropriate, click on the "*Not Contacted*" check box and select the appropriate *Reason* from the drop-down list.
    c. In the *Contacted By* field, select who contacted the person from the drop-down list.
    d. In the *Date* field, enter the date of the contact with this person.
    e. In the *Time* field, enter the time of the contact.
    f. In the *Location* box, enter the information regarding location of the contact.
    g. In the *Others Present* box, enter the information regarding any others present during the contact.
    h. In the *Comments* field, enter any other comments regarding the contact.
    i. Select the *Add* push button (middle to the right) and the information is saved in the *Contact Detail* box at the bottom of the screen. You can repeat this if you've had more than one contact with this person for the purpose of this Safety Assessment.
    j. When you've entered all contacts with the person, select the *Save and Next* icon to go to the next person and repeat the process starting with letter b.

    Note: For error correction, highlight the appropriate line in the *Contact Detail* box, make the changes in the narrative boxes and select the *Update* push button. You may also delete the narrative.

22. After entering all the contacts for this safety assessment, select the *Save & Close* icon and the *Safety Assessment* window displays.
23. If a safety threat has been chosen, a safety intervention must be selected. Select the *Safety Intervention* push button and the *SDM Safety Assessment-Safety Interventions* window displays.

    Note: If 'No Safety Threats' was previously selected, the *Safety Intervention* push button will not be enabled and this section is not applicable.
24. Select the *Safety Interventions* being put into place.
    a. If 'Other (Specify)' and/or 'Other Court Action (Specify)' is selected, you must enter text in the appropriate text box and select TAB on the key board
    b. If the "Intervention to remove a child from the home..." is selected, a subsequent intervention must be chosen
25. Select the *Narrative* push button.
26. Enter a description of how the interventions will keep the children safe.
27. Select the *Save and Close* icon.
28. After all the intervention information is completed, select the *OK* push button and the *Detail SDM Safety Assessment* window displays.
29. Select the *Safety Determination* push button.
30. The *Safety Assessment – Safety Decision* window displays with the list of children in the SDM Household and their safety determination identified.
31. The previously selected safety intervention creates the safety determination.
    a. To change one of the children's determinations, highlight the child, select the *Safety Determination* push button and select the appropriate determination for that child from the drop-down list
    b. When the status is correct for all children, select the *OK* push button and the *Detail SDM Safety Assessment* window displays
32. Select the *Save* icon.
33. Enter the narratives relating to the safety assessment by selecting the *Safety Assessment Narrative* icon.
34. The *SDM Narrative* window displays with the list of narratives to complete. The *Narrative Types Child Vulnerabilities*, *Safety Threat, Safety Intervention,* and *Safety Decision* display require documentation; however, you have already completed all but the Safety Decision narrative. Supervisor Consultation is for documenting any consultations with your supervisor during this assessment process.
    a. Select the first *Narrative Type*, click in the *Current Narrative* box, and enter the narrative.
    b. Select the *Save and Next* icon and the next *Narrative Type* will be highlighted.
    c. Enter the narrative for this *Narrative Type*.
    d. Continue these steps until all appropriate narratives are entered.
    e. After the last narrative is entered, select the *Save and Close* icon and the *Detail SDM Safety Assessment* window displays.

Update the Status of the Safety Assessment

1. Navigate to the *Detail Safety Assessment* window and select *Actions*.
2. Select *Update Status* and one of two things will happen*:*
   a. If required information has not been documented, the *Status Change Edit Errors* dialogue box will display and all of the edit errors must be corrected in order to set the status. Repeat the steps until you receive confirmation message below.
   b. A "Confirm Save" message will display, asking if you want to change the assessment status to "Ready for Review".
3. After all the required information has been documented, select Y*es* and the *Detail SDM Safety Assessment* window displays with the Status of Ready for Review.
4. Close back to the *Detail Program Case* window.

Create an Additional SDM Safety Assessment

1. On the *SDM Household Summary/Detail* window, select the *Sfty Asmnt* push button.
2. The *List SDM Safety Assessment* window displays with a list of safety assessments Select the *New* icon (green piece of paper) at the top left.

   Note: To create a new safety assessment, all previous must be in *Final* status.
3. For completion of the SDM Safety Assessment, refer back to "Create the First SDM Safety Assessment Section," starting with the step "In the *Assessment Date* field, enter the date the assessment started."

View an SDM Safety Assessment

1. On the *List SDM Safety Assessment* window, open the assessment you want to review.
2. Review the information.

*N-FOCUS will not allow the safety assessment's status to be updated if a threat is chosen and a safety plan is not completed. The Safety Plan can be created directly from the *Detail SDM Safety Assessment* window.

SDM SAFETY PLAN

Create the Initial Safety Plan

1. Navigate to the *Detail SDM Safety Assessment* window of the assessment for which a safety plan is being created.
2. Select the *Safety Plan* push button and the *Detail SDM Safety Plan* window displays.
3. In the *Begin Date* field, enter the date the safety plan began.
4. Assign yourself to the safety plan by selecting the *Completed By* out select arrow and the *Search Staff Person* window displays.

   Note: The *Office* field defaults to the office that corresponds to the current user's logon ID and position.
5. Assign yourself to the assessment by:
   a. Selecting the *Completed By* out select arrow,
   b. Enter your Staff Person Logon on the *Search Office Position* window,
   c. Select the *Search* push button and your name and office are pulled into the safety plan.
6. On the *Detail SDM Safety Plan* window, select the *Save* icon and the *Safety Threat Narrative* push button enables.
7. Select the *Safety Threat Narrative* push button and the *SDM Safety Threat Narrative* window displays.
8. Select the *Safety Threats* drop-down arrow and the safety threats selected on the Safety Assessment will display in the drop-down list.
9. For each safety threat:
   a. Select the first safety threat in the drop-down list and the full wording of the Safety Threat displays.
   b. Place the cursor in the *Plan/Services* box and document the plan to keep the children safe;
   c. Place the cursor in the *Monitoring* box and document how the plan will be monitored;
   d. Place the cursor in the *Contingency Plan* box and document "plan B."
   e. Select the S*ave & Next* icon to move to the next Safety Threats listed and repeat steps b-e until narratives for all threats are completed.
   f. After the last narrative for the final safety threat has been documented, select the *Save & Close* push button and the *Detail SDM Safety Plan* window displays.
10. Assign a Safety Plan Monitors to the safety plan by completing one or any combination of the following:
    a. If a person involved in the CFS case is determined suitable as a safety plan monitor, highlight the person in the *Persons Involved In SDM Safety Plan* box and select the *Add As Safety Monitor* push button. As a result, that person will be added to the *Safety Monitors In SDM Safety Plan Person* box. **(Must document Suitability)**

b. If a person being assessed as a safety monitor is not in the CFS case, add him/her into the *Person* box by selecting the *Person* out select arrow in the *Safety Monitors* group box, enter his/her information on the *Person Search* window, and select the *Search* push button to pull this person into the safety plan. **(Must document Suitability)**

c. If an Organization is going to be the safety monitor, select the *Organization* out select arrow in the *Safety Monitors* group box, enter the organization's name in the *Name* field, select the *Search* push button. If a list window displays, highlight the organization you want to assign and select the blue arrow at the top left.

d. Assign a case worker as the monitor by selecting the *Case Worker* out select arrow in the *Safety Monitors* group box, on the *Search Staff Person* window, enter the Staff Person Logon ID, and select the *Search* push button.

11. If needed, a monitor can be removed by highlighting the name and selecting the *Remove* push button next to that group box.
12. Establish suitability for persons in the *Person* group box by completing the following steps:
    a. Highlight the person's name to enable the *Suitability* push button.
    b. Select the *Suitability* push button.
    c. On the *SDM Safety Plan Monitor Assessment* window, answer the questions by highlighting the first question and selecting the *Yes* or *No* push button, answering all the questions.

    Note: Any exception information is completed by the supervisor.

13. Complete background checks for the monitor by doing the following:
    a. Select the *Background Check* icon.
    b. Select the *Type* from the drop-down list.
    c. Enter the date the check was completed in the *Date* field.
    d. Enter the results of the check in the *Results* box.
    e. After the results are entered, select the *Save and Next* icon to move to the next type of background check and repeat the steps.
    f. Continue this process until the *Type* of *Other* has been completed, then select the *Save and Close* icon and the *List Background Checks* window displays.

    Note: To update/create a new background check, on the *List Background Check* window, select the *New* icon (green piece of paper) and enter the information as earlier stated then select the *Save and Close* icon.

14. On the *List Background Check* window, select the *Close* icon and the *SDM Safety Plan Monitor Assessment* window displays.
15. Select the *Save and Close* icon to return to the *Detail SDM Safety Plan* window.
16. Select the *Save and Close* icon to return to the *SDM Household Summary/Detail* window.

Document Progress of the Safety Plan

1. Navigate to the *SDM Household Summary/Detail* window and select the *Sfty Plan* push button.
2. If a list window displays, open the safety plan for which you are updating progress. If there is only one safety plan, the *Detail SDM Safety Plan* window displays.
3. On the *Detail SDM Safety Plan* window, select the *Progress Narrative* push button to display the *SDM Safety Plan Progress Narrative* window.
4. On the *SDM Safety Plan Progress Narrative* window, in the *Current Narrative* box, enter the progress the family has made with the safety plan in place.
5. Select the *Save and Close* icon to return to the *Detail SDM Safety Plan* window.
6. Repeat this process each time the safety plan is assessed. At the end of each day, any narrative entered in the *Current Narrative* box will be pulled into the *Prior Narrative* box.

Update the Safety Plan

When a new safety plan replaces a current safety plan, a new safety assessment is required.

1. From the *Detail Safety Assessment* window, select the *Safety Plan* push button and the *List SDM Safety Plan* window displays.
2. Select the *New* icon (green piece of paper) and the *SDM Safety Plan Copy Forward* pop-up displays asking if you want to copy forward the information from the most recent safety plan. If you select *No* and a blank safety plan will display without the narratives completed in the Safety Threat Narrative section. If you select *Yes* and a blank safety plan will display with the previous *Safety Threat Narratives* copied.
3. Update the Safety Assessment, completing the steps for “Create the First Safety Plan.”

End a Safety Plan

To end a safety plan, a new safety assessment must be completed with no safety threats marked.

View a Safety Plan

1. To view a safety plan, navigate to the *SDM Household Summary/Detail* window.
2. Select the *Sfty Plan* push button and the *List SDM Safety Plan* window displays.
3. Double click to open the safety plan you want to view.

SDM RISK ASSESSMENT

Create the Initial Risk Assessment

1. On the *Detail Program Case* window, select the *SDM* icon and the *SDM Household Summary/Detail* window displays. This window should have at least one Household Name listed. If it doesn't a household and safety assessment need to be created.
2. Highlight the appropriate Household Name in the group box, select the *Risk Asmnt* push button.
3. On the *Detail SDM Initial Risk Assessment* window, in the *Assessment Date* field, enter the date the assessment began.
4. Assign yourself to the assessment by:
    a. Selecting the *Completed By* out select arrow.
    b. On the *Search Office Position* window, enter your Staff Person Logon.
    c. Select the *Search* push button and your name and office is pulled into the safety assessment.
5. Select the *Save* icon and the risk assessment ID Number displays.
6. Tie additional risk assessments to the current risk assessment by selecting the black select out arrow next to *Risk Assessment* and the *Search Initial Risk Assessment* window displays.
7. Enter the *Intake Number* and/or the initial risk assessment ID Nbr.
8. The *List SDM Risk Assessment* window displays with a list of risk assessments to choose from. Highlight the assessment you want to tie and select the blue arrow.
9. Select *OK*.
10. Tie the intake for which the risk assessment is being completed by selecting black out arrow next to the word Intake.
11. Enter the intake number or search by the person's name.
12. Select *Search* and choose the intake by highlighting it and selecting the blue arrow.
13. A confirmation pop-up displays asking if you are sure you want to tie this intake, select *Yes*.
14. The *Intake* (blue phone) and *Allegations* (red phone) icons will enable when the intake is tied.
15. On the *Detail SDM Initial Risk Assessment* window, select the *Contact Detail* push button.
16. For each person:
    a. Select a name from the *Person* drop-down list.
    b. If appropriate, click on the "*Not Contacted*" check box and select the appropriate *Reason* from the drop-down list.
    c. In the *Contacted By* field, select who contacted the person from the drop-down list.
    d. In the *Date* field, enter the date of the contact with this person.
    e. In the *Time* field, enter the time of the contact.
    f. In the *Location* box, enter the information regarding location of the contact.
    g. In the *Others Present* box, enter the information regarding any others present during the contact.
    h. In the *Comments* field, enter any other comments regarding the contact.

i. Select the *Add* push button (middle to the right) and the information is saved in the *Contact Detail* box at the bottom of the screen. You can repeat this if you've had more than one contact with this person for the purpose of this risk assessment.

j. When you've entered all contacts with the person, select the *Save and Next* icon to go to the next person and repeat the process starting with letter b.

Note: For error correction, highlight the appropriate line in the *Contact Detail* Box, make the changes in the narrative boxes and select the *Update* push button. You may also delete the narrative.

17. After entering all the contacts for this risk assessment, select the *Save & Close* icon and the *Detail SDM Initial Risk Assessment* window displays.
18. Select the *Abuse/Neglect Index* push button and the *SDM Initial Risk Assessment-Abuse/Neglect Index* window displays.
19. On the *SDM Initial Risk Assessment-Abuse/Neglect Index* window, enter the information requested by using the drop-down arrows and enter a narrative describing why this answer was chosen.
20. Select the *Save and Next* push button.
21. Repeat steps 19 & 20 until all 16 indexes have an answer and narrative.
22. After the last risk index is documented, select the *Save and Close* push button.
23. On the *Detail SDM Initial Risk Assessment* window, if the scored level is anything other than 'Very High,' select the *Scoring/Override* push button. If the scored level is very high, an override isn't applicable.
24. On the *SDM Initial Risk Assessment – Scoring/Override* window, select the appropriate response from the *Overrides* drop-down list.
25. If no overrides are applicable, select *No Overrides*;

    If a policy override applies, select *Policy Overrides* and the *Policy Overrides* group box enables. Select the appropriate policy override(s) from the group box;

    If a discretionary override applies, select *Discretionary Override* and the next highest risk level displays in the *Discretionary Override* field.
26. Select the *Override Narrative* push button and document the override information. This narrative is required, even if there aren't any overrides. After the narrative is entered, select the *Save & Close* icon and the *SDM Initial Risk Assessment – Scoring/Override* window displays.
27. Select the *OK* push button and the *Detail SDM Initial Risk Assessment* window displays.

    Note: The *Final Level* and *Recommended Decision* fields will now be populated based on the Scoring/Override information entered.
28. Select the *Planned Action* push button and the *SDM Initial Risk Assessment – Planned Action* window displays.
29. Select the Planned Action from the drop-down list.
30. Select the *Conclusion Narrative* push button and the *SDM Narrative* window displays.
31. Document the conclusion of the risk assessment.

32. Select *Save & Close* icon and the *SDM Initial Risk Assessment – Planned Action* window displays.
33. Select the *OK* push button and the *Detail SDM Initial Risk Assessment* window displays.

    Note: The *Planned Action* field will be populated based on the planned action previously entered.
34. Select the *Supplemental Items* push button.
35. On the *SDM Initial Risk Assessment – Supplemental Items* window, enter the answers for the required statements.
36. After all the information is selected, select the *OK* push button and the *Detail SDM Initial Risk Assessment* window displays.
37. Select the *Save* icon.
38. Select the *Risk Assessment Narrative* icon. You've already added narratives for the override and conclusion narratives. If you had any consultation with your supervisor about this risk assessment, you will document it under the Supervisor Consultation narrative.

Update the Status of the Risk Assessment

1. Navigate to the *Detail Risk Assessment* window and select Actions.
2. Select Update Status and one of two things will happen*:*
    a. If required information has not been documented, the *Status Change Edit Errors* dialogue box will display and all of the edit errors must be corrected in order to set the status. Repeat the steps until you receive confirmation message below.
    b. A "Confirm Save" message will display, asking if you want to change the assessment status to "Ready for Review".
3. After all the required information has been documented, select Y*es* and the *Detail SDM Risk Assessment* window displays with the *Status* of *Ready for Review*.

    Note: Supervisor will be responsible for updating the Status to "Revisions Required" or "Final." If the supervisor requests more information and sets the status to "Revisions Required," then the CFSS will make changes/add updates and update the status to "Ready for Review" again.
4. Close back to the *Detail Program Case* window.

SDM PREVENTION ASSESSMENT

Create the Initial Prevention Assessment

1. On the *Detail Program Case* window, select the *SDM* icon and the *SDM Household Summary/Detail* window displays.

   Note: This window must have at least one Household Name listed. If one is not created, a household and safety assessment should be created first.

2. Select (highlight) the appropriate *Household Name* in the group box, select the *Prvntn Asmnt* push button and the *Detail SDM Prevention Assessment* window displays.
3. In the *Assessment Date* field, enter the date the assessment was started.
4. Assign yourself to the assessment by:
   a. Selecting the *Completed By* out select arrow.
   b. On the *Search Office Position* window, enter your Staff Person Logon.
   c. Select the *Search* push button and your name and office is pulled into the safety assessment.
5. If applicable, tie the Intake for which you are completing the assessment by selecting the *Intake* black select out arrow.
   a. On the *Search Intake* window, enter the Intake Number (top left) of the intake you want to tie to this safety assessment.
   b. If you do not have the intake number, in the *Person* box, select the *Select Out* arrow, enter at least the Last name of the intake and select *Search.*
      - If N-FOCUS only finds one name like this, the name is pulled into the *Search Intake* window.
      - If more than one name is found by N-FOCUS, a list displays; highlight the name of the family and select the blue arrow (top left of the window).
   c. The family's name is pulled into the *Search Intake* window. Select the *Search* push button to search for intakes relating to this person.
   d. On the *List Intake* window, highlight the intake to be tied and select the blue arrow to pull it into the assessment.
6. A pop-up displays asking if you want this intake tied to the assessment. Select *Yes* to tie it. The intake has been tied when the *Intake* icon (blue phone) is enabled on *Detail SDM Prevention Assessment* window. If the intake includes allegations, the *Allegation* icon (red phone) will also enable.
7. On the *Detail SDM Prevention Assessment* window, select the *Save* icon and the *Supplemental Items* and *Status History* push buttons enable.
8. Select the *Abuse/Neglect Index* push button and The *SDM Prevention Assessment-Abuse/Neglect Index* window displays.
9. On the *SDM Initial Risk Assessment-Abuse/Neglect Index* window, enter the information requested by using the drop-down arrows and enter a narrative describing why this answer was chosen.
10. Select the *Save and Next* push button.

11. Repeat steps 9 & 10 until all 16 indexes have an answer and narrative.

12. After the last risk index is documented, select the *Save and Close* push button.

    Note: If the Scored Level is 'Very High', the *Planned Action* push button will also be enabled.

13. Select the *Scoring/Override* push button and the *SDM Prevention Assessment – Scoring/Override* window displays.

    Note: If the Scored Level is 'Very High', no action can be taken on the *Scoring Override* window because the level is already at its highest.

14. Select the applicable response from the *Overrides* drop-down list.
15. If there aren't any applicable overrides, select 'No Overrides.'

    OR

    If an override is applicable, select 'Discretionary Override' and the *Discretionary Override* field displays the next highest Score Risk Level. You must enter a narrative about the override. To do this, select the *Override Narrative* push button, and the *Narrative* window displays. Enter the description of the override and then select the *Save & Close* icon to return to the *SDM Prevention Assessment – Scoring/Override* window.

16. Select the *OK* push button and the *Detail SDM Prevention Assessment* window displays.

    Note: The *Final Level* and *Recommended Decision* fields will now be populated based on the Scoring/Override information entered.

17. On the *Detail SDM Prevention Assessment* window, select the *Planned Action* push button and the *SDM Prevention Assessment – Planned Action* window displays.
18. Select the appropriate Planned Action from the drop-down list.
19. Select the *Conclusion Narrative* push button and the *SDM Narrative* window displays.
20. Highlight the Narrative Type Conclusion, enter a summarization of the decision made based on the prevention assessment and summarize the planned action. After the narrative is entered, select *Save & Close* icon.
21. On the *SDM Prevention Assessment – Planned Action* window, Select the *OK* push button and the *Detail SDM Prevention Assessment* window displays.
    Note: On the *Detail SDM Prevention Assessment* window, the *Planned Action* field will be populated with the selected Planned Action.
22. On the *Detail SDM Prevention Assessment* window, select the *Supplemental Items* push button and the *SDM Prevention Assessment – Supplemental Items* window displays.
23. Select answers for each of the two statements.
24. Select the *OK* push button and the *Detail SDM Prevention Assessment* window displays.
25. Enter the dates of the contacts with the family by selecting the *Contact Detail* push button, displaying the *Contact Detail* window.
26. For each person:
    a. Select a name from the *Person* drop-down list.
    b. If appropriate, click on the "*Not Contacted*" check box and select the appropriate *Reason* from the drop-down list.
    c. In the *Contacted By* field, select who contacted the person from the drop-down list.
    d. In the *Date* field, enter the date of the contact with this person.
    e. In the *Time* field, enter the time of the contact.
    f. In the *Location* box, enter the information regarding location of the contact.

g. In the *Others Present* box, enter the information regarding any others present during the contact.

h. In the *Comments* field, enter any other comments regarding the contact.

i. Select the *Add* push button (middle to the right) and the information is saved in the *Contact Detail* box at the bottom of the screen. You can repeat this if you've had more than one contact with this person for the purpose of this assessment.

j. When you've entered all contacts with the person, select the *Save and Next* icon to go to the next person and repeat the process starting with letter b.

Note: For error correction, highlight the appropriate line in the *Contact Detail* Box, make the changes in the narrative boxes and select the *Update* push button. You may also delete the narrative.

27. After entering all the contacts for this assessment, select the *Save & Close* icon and the *Prevention Assessment* window displays.

28. Update the status of the assessment by going to the section titled "Update the Status of the Prevention Assessment."

Create Additional Prevention Assessments

All previous assessments must be in Final status to create an additional assessment.

1. On the *Detail Program Case* window, select the *SDM* icon and the *SDM Household Summary/Detail* window displays.

   Note: This window should have at least one Household Name listed. If one is not created, a household and safety assessment should be created first.

2. Select (highlight) the appropriate Household Name in the group box and select the *Prvntn Asmnt* push button.

3. On the *List Detail SDM Prevention Assessment* window, select the *New* icon (green piece of paper) and follow the instructions of creating the first prevention assessment.

4. Return to *Detail Prevention Assessment* window and continue with updating the status in the next section.

View a Prevention Assessment

1. On the *Detail Program Case* window, select the *SDM* icon and the *SDM Household Summary/Detail* window displays.

2. Select (highlight) the appropriate Household Name in the group box.

3. Select the *Prvntn Asmnt* push button.

4. The *List Detail SDM Prevention Assessment* window displays. Open the assessment you want to view.

Update the Status of the Prevention Assessment

1. Navigate to the *Detail Prevention Assessment* window and select Actions.
2. Select Update Status and one of two things will happen*:*
   - If required information has not been documented, the *Status Change Edit Errors* dialogue box displays and all of the edit errors must be corrected in order to set the status. Repeat the steps until you receive confirmation message below.
     OR
   - A "Confirm Save" message displays, asking if you want to change the assessment status to "Ready for Review".
3. After all the required information has been documented, select Y*es* and the *Detail SDM Prevention Assessment* window displays with the Status of Ready for Review.
4. Close back to the *Detail Program Case* window.

FAMILY FUNCTIONING NARRATIVES

Create New Family Functioning Narratives

1. On the *SDM Household Summary/Detail* window, select the *Narrative* push button to display the *Search Narrative* window.
2. Highlight the Subject Area of Family Functioning and the *New* push button enables.
3. Select the *New* push button and the *Detail Narrative* window displays.
4. By default, the first Item type, Maltreatment Summary and Findings, is highlighted.
5. In the *Occurrence* field, enter the date this information was gathered or it will default to today's date.
6. Enter a summary of the maltreatment and findings in the narrative box.
7. Select the *Save & Next* icon and the next *Item* type, Circumstances Surrounding Maltreatment, will displays.
8. Enter a summary of the circumstances surrounding the maltreatment.
9. Repeat this process using the *Save & Next* icon until all the *Item* types have been documented.
10. After the last narrative is entered, select the *Save & Close* icon and the *Search Narrative* window displays.
11. Select the *Search* push button to list the narratives you just entered. Change the status to "Final" then close the window. On the *Search Narrative* window, select the *Cancel* push button and the *SDM Household Summary/Detail* window displays.
12. When you are done with this window, select the *Save & Close* icon and the *Detail Program Case* window displays.

Update Family Functioning Narratives

1. Navigate to the *SDM Household Summary/Detail* window by selecting the *SDM* icon on the *Detail Program Case* window.
2. Select the *Narrative* push button and the *Search Narrative* window displays.
3. Select the *New* push button.
4. Select the *Item* type.
5. Enter the Occurrence date.
6. Enter the narrative.
7. Select the *Save and Next* icon to enter an additional narrative.

   OR

   Select the *Save and Close* icon to return to the *Search Narrative* window.
8. Search for the narratives you've entered and finalize them.
9. Close back to the *Detail Program Case* window.

The *Family Functioning Narratives* icon is located on the majority of the SDM Assessment windows. You can add/updates narratives from any of the *Narrative* icons and they all go to the same "page."

UNCOPE

Create a New UNCOPE Assessment

1. On the *SDM Household Summary/Detail* window, highlight the SDM household for which you are completing the UNCOPE tool and select the *UNCOPE* icon.
2. To choose the adult in the household being assessed, select the out select arrow and the *Detail UNCOPE Assessment-SDM Household Person* window displays.
3. Select the household member for whom the assessment is being completed.
4. Select *OK* and the household members name is pulled into the *Name* field of the assessment.
5. Assign yourself to the assessment by:
    a. Selecting the *Completed By* out select arrow.
    b. On the *Search Office Position* window, enter your Staff Person Logon.
    c. Select the *Search* push button and your name and office is pulled into the safety assessment.
6. In the *Date Completed* field, enter the date the assessment was completed.
7. Answer each UNCOPE question by selecting *Yes* or *No* from the drop-down list.
8. Enter Comments as appropriate.
9. After all information is entered, select the *Save and Close* icon and the *Confirm Save* window displays advising that once changes have been saved, no changes can be made to the assessment. Make sure the assessment accurately reflects how alcohol and drug use is affecting this caregiver. Select *Yes* to save or select *No* to make changes.
10. Once the *Confirm Save* window is answered, the *List UNCOPE Assessment* window displays.

Create an Additional UNCOPE Tool for an Individual

1. On the *SDM Household Summary/Detail* window highlight the SDM household for which you are completing the UNCOPE tool and select the *UNCOPE* icon.
2. Because previous UNCOPE assessments have been completed for this household, the *List UNCOPE Assessment* window displays.
3. Select the *New* icon (green piece of paper) to create a new UNCOPE Assessment.
4. Repeat the same steps used for creating a new assessment; Use the select out arrows to pull in a family name and the worker assigned, enter the date the assessment was completed, and select *Yes* or *No* to each question, adding comments as appropriate.
5. Select the *Save and Close* icon to return to the list window. You will now have more than one assessment listed.

View/Make Changes to an UNCOPE Assessment

1. On the *List UNCOPE Assessment* window, open the assessment you want to view/make changes to. (The most current assessment is identified by the *Date Completed* field).
2. Either view the assessment or make changes as needed and select the *Save and Close* icon.

CASE STATUS DETERMINATION

1. On the *Detail SDM Risk Assessment* window, select the *Allegation* (red telephone) icon and the *List Allegation* window displays.
2. Findings can be entered a two different ways on the *List Allegation* window:
    a. If the findings are the same for all the allegations:
    b. Highlight all of the allegations.
    c. Select Actions.
    d. Select Enter Findings.
3. If the allegations have different findings, they can be entered one at a time on the *List Allegation* window:
    a. Highlight one allegation.
    b. Select Actions.
    c. Select Enter Findings
4. Findings can also be entered on the *Detail Allegation* window:
    a. Double click on an allegation.
    b. Select Actions.
    c. Select Enter Findings
5. After completing any of the above steps, the *Finding Information* window displays.
6. Select the Finding from the drop-down menu.
7. Enter the Service Status from the drop-down menu.
8. Enter the Finding Date as the date the allegation determination was made
9. If the allegation resulted in a Death of the Victim or a Near Fatality of the Victim, select the appropriate check box.
10. After all information is entered, select the *OK* push button.
11. A confirmation pop-up displays, asking if you are sure you want to save this change. Select *No* to make changes, select *Yes* to continue
12. The *Print Alleged Perpetrator Notification* pop-up displays. You must print this letter. Select OK.
13. The *Print* pop-up displays. Print the letters at this time, sign them, and place a copy in the file.
14. For the Unfounded finding letters, send First Class Mail. For the Court Substantiated, Court Pending, and Agency Substantiated Findings letters, send Certified Mail, with the green card placed in the file. A letter is generated for each allegations, for each child.

SDM FAMILY STRENGTHS & NEEDS ASSESSMENT (FSNA)

Create the Initial FSNA

1. Navigate to the *Detail Program Case* window.
2. Select the *SDM* icon and the *SDM Household Summary/Detail* window displays.

   Note: This window should have at least one Household Name listed.
3. Select (highlight) the appropriate Household Name in the group box and select the *FSN Asmnt* push button.
4. On the *Detail SDM Family Strengths and Needs Assessment* window, in the *Assessment Date* field, enter the date the assessment began.
5. Assign yourself to the assessment by:
   a. Selecting the *Completed By* out select arrow.
   b. On the *Search Office Position* window, enter your Staff Person Logon.
   c. Select the *Search* push button and your name and office is pulled into the assessment.
6. Select the *Save* icon and the *Caregiver Rating, Caregiver Rating Summary, Child Rating* and *Child Rating Summary* push buttons enable.
7. Select the *Caregiver Rating* push button and the *Caregiver Rating Details* window displays.
8. Select the appropriate Caregiver Rating for each caregiver identified.
9. Enter the caregiver Rating Narrative.
10. After the narrative select the *Save & Next* push button and the next Rating Item displays.
11. Repeat the above steps until all 9 *Caregiver Rating Items* have been documented.

    Note: The # 9 Item is utilized to document any strength or needs not fitting into the other care giver ratings. If none are applicable, select “Not applicable” as the rating and you must enter a narrative in the *Rating Narrative* field. If there is a caregiver strength or need not identified, select the rating the rating and describe the caregiver condition in the narrative rating text box.
12. After all the Caregiver Ratings have a rating and narrative, select the *Save & Close* push button and the *SDM Family Strengths and Needs Assessment* window displays.
13. The *Caregiver Rating Summary* push button allows you to view all the Caregiver Ratings and narratives. It also allows you to view any you missed by selecting that rating.
14. On the *SDM Family Strengths and Needs Assessment* window select the *Child Rating* push button and the *Child Rating Details* window displays.
15. Select the child(ren) for whom the Child Rating applies. You can complete these steps by completing one child at a time or if the rating applies to all children, highlighting all children.
16. Select the appropriate Child Rating.
17. Enter the Rating Narrative that supports the child rating.
18. Select the *Save & Next* push button and the next *Child Rating* item displays.

19. Repeat these steps until all 12 Rating Items have been selected and documented.

    Note: The #4 Child Rating item requires the Additional Education Items be documented. To complete this, select the *Additional Education Items* push button. On the *SDM Additional Education Items* window, select the child and complete the information for that child.

    Note: Just like for the Caregiver Rating, the #12 Child Rating item is utilized to document any strength or needs not fitting into the other child ratings. If none are applicable, select the "Not applicable" rating and you must enter a narrative in the corresponding field. If there is a child strength or need not identified, select the rating the rating and describe the child condition in the narrative rating text box.

20. After ratings have been selected and narratives entered for all the Child Rating items, select the *Save and Close* push button and the *SDM Family Strengths and Needs Assessment* window displays.

    Note: You can view all the ratings entered by selecting the *Rating Summary* push button. If a rating was missed, it will be blank on the summary. Double click the Rating Item to go back in and add it.

20. On the *SDM Family Strengths and Needs Assessment* window, select the *Prioritization* push button and the *Caregiver Prioritization and Strength* window displays with the *Caregiver Rating* items previously identified.
21. Select the *Needs Questions* push button and the *Caregiver Needs Questions* dialogue box displays.
22. Enter the information for all the questions regarding the first Need Item.
23. Select the *Next Need Item* push button and the next Need Item displays.
24. Repeat those steps until all of the *Need Items* have been documented.

    Note: The *Next Need Item* push button disables when all items are completed.

25. Once the last item is completed, select the *OK* push button, the *Caregiver Prioritization and Strength* window displays.
26. Select the *Strength Questions* push button and the *Caregiver Strength Questions* dialogue box displays.
27. On the *Caregiver Strength Questions* dialogue box, enter the information for all the questions regarding the first Strength Item.
28. Select the *Next Strength Item* push button and the next Strength Item displays.
29. Answer the questions and select the *Next Strength Item* push button until all of the Strength Items have been documented.

    Note: The *Next Strength Item* push button disables when completed.

30. After all the strength items have been answered, select the *OK* push button and the *Caregiver Prioritization and Strength* window displays.
31. Select the *OK* push button and the *Detail SDM Family Strengths and Needs Assessment* window displays.

32. Select the *Critical Needs* push button and the *SDM Narrative* window displays.

    Note: The *Critical Needs* push button will only be enabled if in the *Prioritization* area, a need has been identified as being related to a safety threat, but it has not been prioritized for the case plan.
33. Select (highlight) the first Narrative Type and enter the Narrative text.
34. Select the *Save & Next* icon to enter narratives for all of the Narrative Types listed.
35. After all the narratives have been completed select the *Save & Close* icon and the *Detail SDM Family Strengths and Needs Assessment* window displays.
36. Select the *Save* icon.
37. Select the *Assessment Narrative* icon and the *SDM Narrative* window displays.
38. Select the Conclusion Narrative Type and enter a summarization about the decision made using the FSNA and summarize the planned action.
39. Select *Save & Close* icon.
40. Select the Supervisor Consultation Narrative Type and document any consultations with the supervisor during this assessment period.
41. Select the *Save and Close* icon and the *Detail SDM Family Strengths and Needs Assessment* window displays.
42. Update the status of the assessment.

Create an Additional FSNA

All previous assessments must be in Final status to create an additional assessment.

1. Navigate to the *Detail Program Case* window.
2. Select the *SDM* icon and the *SDM Household Summary/Detail* window displays.

   Note: This window should have at least one Household Name listed.
3. Select (highlight) the appropriate Household Name in the group box and select the *FSN Asmnt* push button.
4. On the *List SDM Family Strengths and Needs Assessment* window, select the *New* icon (green piece of paper).
5. Continue with the steps for creating a new FSNA, starting with step 5.

View a FSNA

1. On the *Detail Program Case* window, select the *SDM* icon and the *SDM Household Summary/Detail* window displays.
2. Select (highlight) the appropriate Household Name in the group box.
3. Select the *FSN Asmnt* push button.
4. The *List SDM Family Strengths and Needs Assessment* window displays. Open the assessment you want to view.

Update the Status of the Family Strengths and Needs Assessment

1. Navigate to the *Detail SDM Family Strengths and Needs Assessment* window and select Actions.
2. Select Update Status and one of two things will happen*:*
    a. If required information has not been documented, the *Status Change Edit Errors* dialogue box displays and all of the edit errors must be corrected in order to set the status. Repeat the steps until you receive confirmation message below.
    b. A "Confirm Save" message displays, asking if you want to change the assessment status to "Ready for Review".
3. After all the required information has been documented, select Y*es* and the *Detail SDM Family Strengths and Needs Assessment* window displays with the *Status* of *Ready for Review*.
4. Close back to the *Detail Program Case* window.

SDM RISK RE-ASSESSMENT

Create the Initial Risk Reassessment

1. Navigate to the *Detail Program Case* window.
2. Select the *SDM* icon and the *SDM Household Summary/Detail* window displays.

   Note: This window should have at least one Household Name listed.
3. Select (highlight) the appropriate Household Name in the group box and select the *Risk Re-Asmnt* push button.
4. On the *Detail SDM Risk Reassessment* window, in the *Assessment Date* field, enter the date the assessment started.
5. Assign yourself to the assessment by:
   a. Selecting the *Completed By* out select arrow.
   b. On the *Search Office Position* window, enter your Staff Person Logon.
   c. Select the *Search* push button and your name and office is pulled into the assessment.
6. Select *Save* icon and the Risk Reassessment ID Number displays.
7. Select the *Risk Index* push button and the *SDM Risk Reassessment- Risk Index* window displays.
8. On the *SDM Risk Reassessment Abuse/Neglect Index* window, enter the information requested by using the drop-down arrows and enter a narrative describing why this answer was chosen.
9. Select the *Save and Next* push button.
10. Repeat steps 8 & 9 until all 9 indexes have an answer and narrative.
11. After the last risk index is documented, select the *Save and Close* push button.
12. Select the *Scoring/Overrides* push button and the *SDM Risk Reassessment – Scoring and Overrides* window displays.
13. For each Policy Override statements, highlight the override and select either *Yes* or *No.*
14. Select *Yes* or *No* for Discretionary Override. If *Yes* is selected, you must also select a response from the drop-down list and document the Override Narrative by completing the following steps:
    a. Select the *Override Narrative* push button and the *SDM Narrative* window displays
    b. Select the Narrative Type of override and enter documentation describing the review of the risk reassessment and decisions made.
    c. Select the *Save and Close* icon and the *SDM Risk Reassessment – Scoring and Overrides* window displays.
15. Select the *OK* push button and the *SDM Risk Reassessment* window displays with the *Recommended Decision* field populated.
16. Select the *Save* icon.
17. Enter the dates of the contacts with the family by selecting the *Contact Detail* push button, displaying the *Contact Detail* window.

18. For each person:
    a. Select a name from the *Person* drop-down list.
    b. If appropriate, click on the "*Not Contacted*" check box and select the appropriate Reason from the drop-down list.
    c. In the *Contacted By* field, select who contacted the person from the drop-down list.
    d. In the *Date* field, enter the date of the contact with this person.
    e. In the *Time* field, enter the time of the contact.
    f. In the *Location* box, enter the information regarding location of the contact.
    g. In the *Others Present* box, enter the information regarding any others present during the contact.
    h. In the *Comments* field, enter any other comments regarding the contact.
    i. Select the *Add* push button (middle to the right) and the information is saved in the *Contact Detail* box at the bottom of the screen. You can repeat this if you've had more than one contact with this person for the purpose of this assessment.
    j. When you've entered all contacts with the person, select the *Save and Next* icon to go to the next person and repeat the process starting with letter b.

    Note: For error correction, highlight the appropriate line in the *Contact Detail* box, make the changes in the narrative boxes and select the *Update* push button. You may also delete the narrative.
19. After entering all the contacts for this assessment, select the *Save & Close* icon and the *Risk Reassessment* window displays.
20. On the *Detail SDM Risk Reassessment* window, select the *Narrative* icon and the *SDM Narrative* window displays.
21. Select Narrative Type "Conclusion".
22. Document a summarization of the decision made using the risk reassessment and summarize the planned action.
23. Select the *Save & Next* icon.
24. In the Narrative Type "Supervisor consultation," enter any consultations with the supervisor during this assessment period.
25. Select the *Save and Close* icon and the *Detail SDM Risk Reassessment* window displays.
26. Select the *Family Functioning Narrative* icon to update any of these narratives.
27. Continue with updating the status of the assessment.

Create an Additional Risk Reassessment

All previous assessments must be in Final status to create an additional assessment.

1. Navigate to the *Detail Program Case* window.
2. Select the *SDM* icon and the *SDM Household Summary/Detail* window displays.

3. Select (highlight) the appropriate Household Name in the group box and select the *Risk Re-Asmnt* push button.
4. On the *List Detail SDM Risk Reassessment* window, select the *New* icon (green piece of paper).
5. Starting with step 5, continue with the steps under the section "Create the Initial Risk Reassessment."

View a Risk Reassessment

1. On the *Detail Program Case* window, select the *SDM* icon and the *SDM Household Summary/Detail* window displays.
2. Select (highlight) the appropriate Household Name in the group box.
3. Select the *Reunif. Asmnt* push button.
4. The *List Detail SDM Risk Reassessment* window displays. Open the assessment you want to view.

Update the Status of the Risk Reassessment

1. Navigate to the *Detail Risk Reassessment* window and select Actions.
2. Select Update Status and one of two things will happen*:*
    a. If required information has not been documented, the *Status Change Edit Errors* dialogue box displays and all of the edit errors must be corrected in order to set the status. Repeat the steps until you receive confirmation message below.
    b. A "Confirm Save" message displays, asking if you want to change the assessment status to "Ready for Review".
3. After all the required information has been documented, select Y*es* and the *Detail SDM Risk Reassessment* window displays with the *Status* of *Ready for Review*.
4. Close back to the *Detail Program Case* window.

SDM REUNIFICATION ASSESSMENT

Create the Initial Reunification Assessment

1. Navigate to the *Detail Program Case* window.
2. Select the *SDM* icon and the *SDM Household Summary/Detail* window displays.

   Note: This window should have at least one Household Name listed.
3. Select (highlight) the appropriate Household Name in the group box, select the *Reunif. Asmnt* push button.
4. On the *Detail Reunification Assessment* window, in the *Assessment Date* field, enter the date the assessment started.
5. Assign yourself to the assessment by:
   a. Selecting the *Completed By* out select arrow
   b. On the *Search Office Position* window, enter your *Staff Person Logon*
   c. Select the *Search* push button and your name and office is pulled into the assessment.
6. For each child who has been removed:
   a. In the *Persons Involved in the Assessment* group box, select (highlight) the child that has been removed and the *Removed* push button enables**.**
   b. Select the *Removed* push button and a 'Y' displays in the Removed column for the child selected.
7. Select the *Save* icon and the reunification assessment ID Nbr displays.
8. Select the *Risk Index* push button and the *Reunification Assessment-Risk Index* window displays.
9. Select the appropriate Initial Risk Level or Prevention Level from the drop-down list.

   Note: The *Risk Assessment* and *Prevention Assessment* push buttons are enabled to allow you to review which Risk Level had been previously determined.
10. Document the answers for the remaining questions on the window.
11. Select the *Narrative* push button and the *SDM Narrative* window displays.
12. Select the first Narrative Item and enter the narrative text.
13. Select the *Save & Next* icon and the next Narrative Type will be highlighted.
14. Enter the narrative text.
15. After all the narratives are entered, select the *Save & Close* icon and the *Reunification Assessment-Risk Index* window displays.
16. Select the *OK* push button and the *Detail Reunification Assessment* window displays.
17. Select the *Safety Re-asmnt* push button and the *Reunf Assessment-Safety Threats/ Decision* window displays.
18. If appropriate, select the appropriate Removal Safety Threats.

    Note: The Removal Safety Threats are not required.

19. Select the appropriate Current Safety Threats.
20. If no safety threat exists, select the *No Safety Threats* push button at the bottom of the window and an informational pop-up displays. Select *No* to go back and select a threat or select *Yes* to continue.

    Note: If '*Other (Specify)*' is selected, you must enter text in the *Comments* text box.
21. Select the Safety Decision from the drop-down list.
22. Select the *Narrative* push button and the *SDM Narrative* window displays.
23. Select the first Narrative Item and enter the narrative text.
24. Select the *Save & Next* icon and the next narrative Type will be selected.
25. Enter the narrative text.
26. Repeat until narratives are entered for all Narratives Types. After the last narrative is entered, select the *Save & Close* icon and the *SDM Reunif Assessment – Safety Threats/Decision* window displays.
27. Select *OK* and the *Detail Reunification Assessment* window displays.
28. Select the *PT Summary* push button and the *Parenting Time Summary List* window displays.
29. Select (highlight) the first Caregiver Name and double click or select the *Open* icon and the *Detail Parenting Time Evaluation* window displays.
30. Select the appropriate Parenting Time Frequency from the drop-down list.
31. Select the appropriate Quality of Face-to-Face from the drop-down list and the *Parenting Time* field displays.
32. If the Parenting Time is 'Acceptable', the *Overrides* group box enables. If appropriate you can select one of the options. If the Discretionary Override is selected, a description must be entered in the *Comments* box. If no overrides apply, skip this step.
33. If a secondary caregiver exists, select the *Next* push button and the Secondary Caregiver Name displays. If no secondary caregiver exists, skip this and the next step.
34. Repeat steps 40 & 41 for the secondary caregiver.
35. Select the *Narrative* push button and the *SDM Narrative* window displays.
36. Select the first Narrative Item and enter the narrative text.
37. Select the *Save & Next* icon and the next Narrative Type will be selected.
38. Enter the narrative. If Parenting Time Override is applicable, select the *Save and Next* icon after documenting the supports and document the override.
39. Select the *Save & Close* icon and the *Detail SDM Parenting Time Evaluation* window displays.
40. Select the *OK* push button and the *List SDM Parenting Time Summary* window displays.
41. Select the *Close* icon and the *Detail Reunification Assessment* window displays.
42. Select the *Scoring/Overrides* push button and the *SDM Reunification Assessment – Score Overrides* window displays.
43. On the *SDM Reunification Assessment – Score Overrides* window, select each of the Policy Override statements and select either *Yes* or *No.*

44. Select *Yes* or *No* for Discretionary Override.
45. If *No* is selected, skip this step. If an override is applicable, select *Yes*, and a response from the drop-down list must be selected and the override narrative documented.
    a. To document the override narrative, select the *Override Narrative* push button.
    b. Enter a description of the override.
    c. Select the *Save and Close* icon.
46. On the *SDM Reunification Assessment – Score Overrides* window, select the *OK* push button and the *Detail Reunification Assessment* window displays.
47. Select the *Recommendations* push button and the *SDM Reunification Assessment-Recommendations* window displays.
48. On the *SDM Reunification Assessment-Recommendations* window, select (highlight) the *Child Name* and the *Update* push button enables.
49. Select the *Update* push button and either the *Specify In-care* dialogue box displays or the *Specify Override or New Goal* dialogue box displays depending upon the risk level, parenting time and/or safety decision. Or, if you received the *Specify In-Care* dialogue box, answer 15 of 22 Months question.
50. Select the *OK* push button and the *Specify Override or New Goal* dialogue box displays.
51. Select the appropriate Discretionary Override from the drop-down list.

    Note: Certain Discretionary Override selections will enable the *New Goal Recommendation* drop-down list. If appropriate, select the New Goal Recommendation from the drop-down list.
52. Select the *OK* push button and the *SDM Reunification Assessment-Recommendations* window displays.
53. Select the *Narrative* push button and the *SDM Narrative* window displays.
54. Enter the narrative text.
55. After the narrative is entered, select the *Save & Close* icon and the *SDM Reunification Assessment-Recommendations* window displays.
56. Select the *OK* push button and the *Detail Reunification Assessment* window displays.
57. If applicable, select the *Safety Plan* push button and update the safety plan.
58. Select the *Narrative* icon and the *SDM Narrative* window displays.
59. Select Narrative type “Conclusion”.
60. Enter a summarization of the conclusion of the assessment.
61. After the narrative is entered, select the *Save and Close* icon.
62. Update the applicable Family Functioning Narratives by selecting the *Family Functioning Narratives* icon, then highlight the Subject Area you want to update, select the *New* push button, enter the narrative, select the *Save and Close* icon, then select the *Cancel* push button to return to the *Detail Reunification Assessment* window.
63. Update the Status of the assessment by continuing with the “Update the Status of the Reunification Assessment.”

Create an Additional Reunification Assessment

All previous assessments must be in Final status to create an additional assessment.

1. Navigate to the *Detail Program Case* window.
2. Select the *SDM* icon and the *SDM Household Summary/Detail* window displays.

   Note: This window should have at least one Household Name listed.
3. Select (highlight) the appropriate Household Name in the group box and select the *Reunif. Asmnt* push button.
4. On the *List Detail Reunification Assessment* window, select the *New* icon.
5. Starting with Step 5, continue the steps in the "Create the Initial Reunification Assessment Section."

View a Reunification Assessment

1. On the *Detail Program Case* window, select the *SDM* icon and the *SDM Household Summary/Detail* window displays.
2. Select (highlight) the appropriate Household Name in the group box.
3. Select the *Reunif. Asmnt* push button.
4. The *List Detail Reunification Assessment* window displays. Open the assessment you want to view.

Update the Status of the Reunification Assessment

1. Navigate to the *Detail Reunification Assessment* window and select Actions.
2. Select Update Status and one of two things will happen*:*
   a. If required information has not been documented, the *Status Change Edit Errors* dialogue box displays and all of the edit errors must be corrected in order to set the status. Repeat the steps until you receive confirmation message below.
   b. A "Confirm Save" message displays, asking if you want to change the assessment status to "Ready for Review".
3. After all the required information has been documented, select Y*es* and the *Detail Reunification Assessment* window displays with the Status of Ready for Review.
4. Close back to the *Detail Program Case* window.

SDM ASSESSMENT OF PLACEMENT SAFETY AND SUITABILITY (APSS)

Create a New Assessment of Placement Safety and Suitability

1. On the *N-FOCUS Main Menu*, select the *Organization* icon.
2. On the *Search Organization* window, enter the name of the placement and select the *Search* push button.
3. On the *Detail Organization* window, select the *Home Detail* push button and the *Home Details* window displays.
4. On the *Home Details* window, select the *SDM Assessment of Placement Safety and Suitability* icon and the *Detail SDM Assessment of Placement Safety and Suitability* window displays.
5. In the *Date* field, enter the date the assessment began.
6. In the *Ref. Date* field, enter the date the intake was accepted for out of home assessment.
7. Assign yourself to the assessment by:
    a. Selecting the *Completed By* out select arrow.
    b. On the *Search Office Position* window, enter your Staff Person Logon.
    c. Select the *Search* push button and your name and office is pulled into the safety assessment.
8. Select the *Save* icon and information populates and some push buttons enable.
9. If applicable, tie the Intake for which you are completing the assessment by selecting the *Intake* black select out arrow and complete the following steps:
    a. On the *Search Intake* window, enter the Intake Number (top left) of the intake you want to tie to this safety assessment.
    b. If you do not have the intake number, in the *Person* box, select the select out arrow, enter at least the Last name of the intake and select *Search.*
        - If N-FOCUS only finds one name like this, the name is pulled into the *Search Intake* window.
        - If more than one name is found by N-FOCUS, a list will display; highlight the name of the family and select the blue arrow (top left of the window).
    c. The family's name is pulled into the *Search Intake* window. Select the *Search* push button to search for intakes relating to this person.
    d. On the *List Intake* window, highlight the intake to be tied and select the blue arrow to pull it into the assessment.
    e. A pop-up will display asking if you want this intake tied to the assessment. Select *Yes* to tie it. The intake has been tied when the *Intake* icon (**blue phone**) is enabled. If the intake includes allegations, the *Allegation* icon (**red phone**) will also enable the *Intake* select intake arrow.

    Note: You can untie an intake by going to Actions and selecting Untie Intake.

10. On the *Detail SDM Assessment of Placement Safety and Suitability* window, select the *Child Vulnerabilities* push button and the *SDM Assessment of Placement Safety and Suitability-Child Vulnerabilities* window displays.
11. Select the Child Vulnerabilities applicable to the most vulnerable child in the household. If you select the Other (specify) vulnerability, an explanation must be entered in the narrative box.
12. Select the *Narrative* push button and enter the information gathered to support the vulnerabilities chosen.
13. Select the *OK* push button and the *Assessment of Placement Safety and Suitability* window displays.
14. Select the *Safety Concerns* push button and the *SDM Assessment of Placement Safety and Suitability-Safety Concerns* window displays.
15. Select all applicable safety concerns in the list.
    - If there aren't any safety concerns, select the *No Safety Concerns* push button at the bottom of the screen.
    - If the first Safety Concern is selected, a subsequent concern listed under it must also be selected.
    - If 'Other Safety Concern (Specify)' and/or 'Other Care Concern (Specify)' is selected, you must enter text in the text box and select TAB on the keyboard to enable the *OK* push button.
    - If *No Safety Concerns* push button was selected, a confirmation pop-up window displays asking if the decision is suitable; Select *Yes* to continue or *No* to go back and select a concern.
16. Select the *Narrative* push button and enter a narrative describing the concerns.
17. Select the *OK* push button.
18. If a safety concern was present, select the *Safety Intervention* push button on the *Assessment of Placement Safety and Suitability* window.

    Note: If 'No Safety Concerns' was previously selected, the *Safety Intervention* push button will not be enabled.
19. On the *SDM Assessment of Placement Safety and Suitability-Safety Interventions* window, select the interventions being utilized.

    Note: If 'Other (Specify)' is selected, a description must be entered in the text box.
20. Select the *Narrative* push button and enter a narrative describing the concerns.
21. Select the *OK* push button and the *Assessment of Placement Safety and Suitability* window displays.
22. Select the *Placement Decision* push button and the *Placement Decision* dialogue box displays.

    Note: If 'No Safety Concerns' was previously selected, the *Placement Decision* push button will not be enabled.
23. Select the appropriate *Placement Decision* from the drop-down list.
24. Select the *OK* push button and the *Assessment of Placement Safety and Suitability* window displays with the *Placement Decision* field populated.

25. Select the *Intervention Plan* push button and the *SDM Intervention Plan Narrative* window displays.

    Note: If 'No Safety Concerns' was previously selected, the *Intervention Plan* push button will not be enabled.

26. The Safety Concerns previously selected will display in the drop-down list. For each Safety Concern:

    a. Select the safety concern from the drop-down list and the full wording of the safety concern displays,
    b. Select the safety concern in the drop-down list,
    c. Enter descriptions in the three narrative fields,
    d. Select the *Save & Next* icon to enter narratives for the next safety concerns listed,
    e. After all safety concerns have narratives in all three field, select the *Save & Close* icon.

27. On the *Assessment of Placement Safety and Suitability* window, select the *Contact Detail* push button.

28. For each person:

    a. Select a name from the *Person* drop-down list.
    b. If appropriate, click on the "*Not Contacted*" check box and select the appropriate *Reason* from the drop-down list.
    c. In the *Contacted By* field, select who contacted the person from the drop-down list.
    d. In the *Date* field, enter the date of the contact with this person.
    e. In the *Time* field, enter the time of the contact.
    f. In the *Location* box, enter the information regarding location of the contact.
    g. In the *Others Present* box, enter the information regarding any others present during the contact.
    h. In the *Comments* field, enter any other comments regarding the contact.
    i. Select the *Add* push button (middle to the right) and the information is saved in the *Contact Detail* box at the bottom of the screen. You can repeat this if you've had more than one contact with this person for the purpose of this risk assessment.
    j. When you've entered all contacts with the person, select the *Save and Next* icon to go to the next person and repeat the process starting with letter b.

    Note: For error correction, highlight the appropriate line in the *Contact Detail* box, make the changes in the narrative boxes and select the *Update* push button. You may also delete the narrative.

29. After entering all the contacts for this assessment, select the *Save & Close* icon.

30. On the *Assessment of Placement Safety and Suitability* window select the *Family Functioning Narratives* push button.

31. On the *Search Narrative* window enter narrative information into the applicable *Subject Areas* by completing the following steps:

    a. Highlight the Subject Area
    b. Select the *New* push button
    c. If applicable, select the Item Type
    d. Enter the Occurrence Date
    e. Enter the narrative
    f. Select the *Save and Close* icon

   g. Repeat the process for each Subject Area
   h. When all narratives have been entered, close back to the *Assessment of Placement Safety and Suitability* window.

32. On the *Assessment of Placement Safety and Suitability* window, select the *Narrative* icon.
33. On the *SDM Narrative* window, select the first *Narrative Type*.
34. Some of the narratives you completed earlier and pulled into this area. For each Narrative Type, without information, enter the narrative and select the *Save and Next* icon. After the last narrative is entered, select the *Save and Close* icon.

    Note: Concerns, Interventions, and Placement Decision narratives are required. Supervisor Consultation narrative is optional but any consult with the supervisor relating to this assessment should be documented here.
35. Return to the *Detail SDM Assessment of Placement Safety and Suitability* window.

Update the Status of the APSS

1. On the *Detail SDM Assessment of Placement Safety and Suitability* window select Actions.
2. Select Update Status and one of two things will happen*:*
   a. If required information has not been documented, the *Status Change Edit Errors* dialogue box will display and all of the edit errors must be corrected in order to set the status. Repeat the steps until you receive confirmation message below.
   b. A “Confirm Save” message will display, asking if you want to change the assessment status to “Ready for Review”.
3. After all the required information has been documented, select Y*es* and the *Detail SDM Assessment of Placement Safety and Suitability* window displays with the *Status* of *Ready for Review*.
4. Close back to the *Detail Program Case* window.

Change of Placement

If the intervention to remove a child from the placement was chosen, a “placement change” needs to be made on the *Detail SDM Assessment of Placement Safety and Suitability* window*.*

1. On the *Detail SDM Assessment of Placement Safety and Suitability* window, in the *Persons Involved in Assessment* box, highlight the child being removed and the *Placement Change* push button becomes enabled.
2. Select the *Placement Change* push button and a confirmation message displays asking if you want to continue.
3. Select No if you do not want to continue.
   OR
   Select Y*es* and the *Assessment of Placement Safety and Suitability* window displays with a ‘Y’ in the Placement Change column next to the highlighted child.
4. Repeat steps for each child designated for removal.
5. Upon designating removal for identified child/ren the *Detail SDM Assessment of Placement Safety and Suitability* will show placement change.

Create an Additional APSS

1. On the *N-FOCUS Main Menu*, select the *Organization* icon.
2. On the *Search Organization* window, enter the name of the placement and select the *Search* push button.
3. On the *Detail Organization* window, select the *Home Detail* push button and the *Home Details* window displays.
4. On the *Home Details* window, select the *SDM Assessment of Placement Safety and Suitability* icon and the *Detail List SDM Assessment of Placement Safety and Suitability* window displays.
5. Chose the *New* icon and starting with step 5, follow the steps to create a new APSS.

REMOVAL AND PLACEMENT

****A child must be a ward and removed from the home to create a Removal/Placement on N-FOCUS. If the child is a ward and this isn't reflected on N-FOCUS, make the child a ward before proceeding to the Removal/Placement.**

****If the child is not a ward and is placed outside the home, change the child's legal status to Child of a Non-Court Case and complete an Approved Informal Living Arrangement.**

Create a Removal

1. On *Detail Program Case* window, highlight the child removed from the home.
2. Select Actions.
3. Select Children and Family Services.
4. Select Create Removal.
5. Answer *Yes*/*No* to the pop-up if the child is being removed from his/her parent.
6. Complete all necessary information.
7. *Save* (solid blue icon).
8. Select *Consultation Point Narrative* push button.
9. Write Recommend Removal Narrative.
10. Save & Close.

Create a Placement

1. On *Detail Program Case* window, select *Removal/Placement* icon.
2. Select Actions.
3. Select Create Placement.
4. Highlight child who needs placement.
5. Select the *Utilization Criteria* icon (123?).
6. Answer questions…Save & Next to Least Restrictive Environment.
7. Save & Close.
8. If all the answers are correct, close the window. If any of the answers are incorrect, double click on the question and change the answer, *Save and Close*.
9. Select the Type of Placement from the drop-down list.
10. Select Facility Type based on questions you answered in Utilization Criteria.
11. Select *Organization* black arrow icon, enter search criteria.
12. Select *Search*.
13. Select Organization needed by highlighting and selecting the blue arrow to pull it back in.
14. Select the *Save* icon.

Activate a Placement

1. On *Detail Placement* window, select *Actions*.
2. *Activate Placement* (Status is populated with Active Status).

3. Enter Status Date.
4. Select the *Additional Details* push button and complete the information.
5. Select *OK*.
6. Save & Close.

Create Child Disclosure/Placement Agreement

1. From the *List Removal / Placement* window, select *Child Disclosure/Placement Agreement* icon.
2. Select the *Narrative* icon.
3. Highlight the Subject Area Child Disclosure.
4. Select *New* push button.
5. Complete Narratives as appropriate (all fields must have content, even if it is “N/A or Does Not Apply”).
6. Save & Close.
7. Select *Cancel* push button.
8. Select the *Characteristics* push button—complete appropriate information (i.e.…make sure it is current behavior).
9. Enter Pharmacy.
10. Complete Checklist: attached information.
11. *Actions—Print - Draft* or *Final* as appropriate.

Create a New Payment Determination

1. On *Detail Program Case* window, highlight child for which payment is being determined.
2. Select *Payment Determination* icon **(Green $).**
3. Enter the *Assessment Date*.
4. Select the *Assessment Type*.
5. Assign yourself to the Payment Determination using the black *Select Out* arrow for the *Completed By* field.
6. Select the *Caregiver Responsibilities* push bar.
7. Select the radio button pertaining to the correct response.
8. Select the Save and Next push bar.
9. Repeat this process until all categories have been completed.
10. *Save & Close*.
11. Select *Actions*, *Update Status*.
12. Select yes on the confirmation window and notify your supervisor this has been completed.

Create an Additional Payment Determination

1. Repeat steps 1 & 2 above.
2. On the list window, select the *New* icon.
3. Repeat steps 3-10 above.

Close a Placement

1. On *Detail Program Case* window, highlight child for whom you need to close placement.
2. Select the *Placement/Removal* icon.
3. Highlight placement that needs to be closed.
4. Select the *Open* icon or double click.
5. Select Actions.
6. Select Close Placement.
7. Complete information as needed.
8. *Save* icon and enter narrative if needed.

View a Removal/Placement

1. On the *CFS Detail Program Case* window, highlight the ward.
2. Select the *Removal/Placement* icon.
3. Double click on the Removal or Placement to view.

****Create School District Notice (Correspondence) letter to notify the school of the child's legal status and placement.**

****Create a Change of Placement Notice.**

APPROVED INFORMAL LIVING ARRANGEMENT

Creating an Approved Informal Living Arrangement (AILA)

1. Navigate to the *Detail Program Case* window.
   Note: This can also be done from the *Action* drop-down on the *AILA List* window when there is more than one instance of AILA.
2. Select (highlight) the child for whom you need to create a placement.
   Note: To be placed in the new AILA status, the child must:
   - Be under 18 years of age active in an open CFS program case.
3. Select the Actions menu.
4. Select Children Family Services.
5. Select Create Approved Living Arrangement.
6. Enter the Begin Date.
7. Select the *Caregiver* black out select arrow.
8. Select (highlight) the person with whom the child will be placed.
   Note: At this time you can select the *Background Checks* icon **(Green with Red Checkmark**) to verify or enter the required Background checks for the Caregiver.
9. Select the Caregivers Relationship with the child.
10. Select a second Caregiver, if necessary.
    Note: You can delete the AILA instance if necessary by opening the instance and selecting Actions - Delete.
11. Select the *Save and Close* icon.
12. Select *OK.*
13. When the informal placement closes, enter the end date and the reason.

Creating an Historical Approved Informal Living Arrangement

Note: To create the historical arrangement, there must be a gap in placement dates.

1. Navigate to the *Detail Program Case* window.
   Note: This can also be done from the *Action* drop-down on the *AILA List* window when there is more than one instance of AILA.
2. Select (highlight) the child for whom you need to create an historical placement.
   Note: To be placed in the new AILA status, the child must:
   - Be under 18 years of age
3. Select the Actions menu.
4. Select Children Family Services.
5. Select Create Historical Approved Living Arrangement.
6. Enter the Begin Date.
7. Enter the End Date.

8. Enter the Closed Reason.
9. Select *OK*.
10. Select the *Caregiver* black out select arrow.
11. Select the person with whom the child was placed.
12. Select the Caregivers relationship with the child
13. A second caregiver can also be entered if necessary
    Note: You can delete the AILA instance if necessary by opening the instance and selecting Actions - Delete.
14. *Save and Close*.
15. Select *OK.*

View an Approved Informal Living Arrangement

1. Navigate to the *Detail Program Case* window.
2. Select the *Approved Information Living Arrangement* icon.
3. View the information.
4. Close the window when finished.

VISITATION PLAN

**When the visitation plan is updated, refer to the Create an Additional Visitation Plan section. Using this feature allows you to only update previously entered information.

Create New Visitation Plan

1. On *the Detail Program Case* window, select (highlight) the Program Case Persons (you can choose any or all people in the Program Case) that you want included in a visitation plan.
2. Select the Actions menu.
3. Select Children Family Services.
4. Select Create Visitation Plan and the *Detail Visitation Plan* window displays.
5. On the *Detail Visitation Plan* window, enter the *Begin Date* of the visitation plan.
6. Enter the *Target Date* (proposed end date) of the visitation plan (typically 3 months).
7. Modify the *Preparation Date*, if applicable.
8. Select the appropriate *Arrow* icon or enter text for the type of staff or organization or other person that will be supervising/monitoring the visit.
9. Select the *Plan* push button and the *Visitation Plan Description* dialog box displays.
10. Enter text in any or all of the text fields.

    Note: Tab will allow you to move the cursor from field to field.
11. Select the *OK* push button and the *Detail Visitation Plan* window displays.
12. Select the *Save* icon.

Update a Visitation Plan in Draft Status

1. Navigate to the *Detail Program Case* window.
2. Highlight one person involved in the plan and select the *Visitation Plan* icon and the *Detail Visitation Plan* window displays. If there are multiple plans, the *List Visitation Plan* window displays.
3. Modify any information on this window.
4. Select the *Plan* push button and the *Visitation Plan Description* dialog box displays.
5. Enter any modified text in any or all of the text fields.
6. Select the *OK* push button and the *Detail Visitation Plan* window displays.
7. Select the *Save and Close* icon.

Create an Additional Visitation Plan

Managing a visitation plan using save and copy

- The “Save and Copy” function of Visitation Plan is found under ***FILE*** not *Actions*.
- Make sure that the plan is in final status and has an **actual** end date before saving and copying.

1. Navigate to the *Detail Visitation Plan* window.
2. Change the Status from Draft to Final
3. Enter an actual End Date.
4. Select *Save and Copy* under the ***File*** menu not *Actions*.

Close a Visitation Plan

1. Navigate to the *Detail Visitation Plan* window.
2. Enter the Actual End Date.
3. Select the *Save and Close* icon and the *List Visitation Plan* window displays with the Actual End Date populated. Or the *Detail Program Case* window displays.
4. Select the *Menu* icon to return to the N-FOCUS Main Menu and the *Main Menu* displays.

SDM CASE PLAN

The SDM case plan is developed by the family team and based on the Family Strengths and Needs Assessment. All families involved with Child and Family Services (court and non-court) for ongoing services will have a case plan.

**When the Case Plan is updated, refer to the Update a SDM Case Plan section. Using this feature allows you to only update previously entered information.

Create a New SDM Case Plan

1. From the *Detail Program Case* window, a new SDM Case Plan can be created by following one of these actions:
    a. Select the *Case Plan* button. If there is an existing SDM Case Plan, the *List SDM Case Plan* window displays; select the *New* icon to proceed. If there is not an existing SDM Case Plan, the *Detail SDM Case Plan* window displays.

    OR

    b. Another way is to select *Action*, *Children and Family Services*, and *Create SDM Case Plan* and the *Detail SDM Case Plan* window displays.

    OR

    c. The last way to create a SDM Case Plan is to select the *SDM* icon from the *Detail Program Case* window and the *SDM Household Summary/Detail* window displays.

    Highlight the Household Name the case plan is being created for and select the *Case Plan* push button and the *Detail SDM Case Plan* window displays with the Household Name already populated.

On the *Detail SDM Case Plan* window, complete the following steps:

2. If not already populated, select the Household Name (*HH Name*) by completing the following steps:
    a. Select the HH Name black arrow *Select* icon to access the *SDM Household Summary/Detail* window;
    b. Select the appropriate Household Name;
    c. Select the blue arrow *Select* icon to pull the household name in and the *Detail SDM Case Plan* window will display with the *HH Name* field populated with the Persons involved in the Plan listed at the bottom of the window.
3. In the *Begin Date* field, enter the date the case plan began.
4. In the *End Date* field, enter the date the case plan will end.

    Note: Begin and End dates for case plans must be within 184 days. An error message will appear if the time exceeds that requirement.

5. Assign yourself to the case plan by selecting the *Completed by* black arrow *Select* icon and locate your position using your log on ID or searching for your name.
6. The SDM Case Plan could be saved in Draft Status at this point.
7. The *Court Modified* check box is checked if the Court modifies the SDM Case Plan.

8. The *No Family Participation* check box is checked if the family refuses to participate in the goals of the SDM Case Plan and/or refused to sign the plan.
    - If this box is checked, a warning message will appear stating it is mandatory for the *Family Participation Attempts* narrative to be entered.
        - Selecting Yes on this message will take you to the narrative to enter immediately.
        - Selecting No will navigate you back to the *Detail SDM Case Plan* window. You can then enter the *Family Participation Attempts* narrative by clicking the *Plan Narrative* icon. Selecting Yes will bring you to the *SDM Narrative* window, where you can enter the reason why the family did not participate in the development of the case plan or refused to sign the case plan.

Add a Person to the SDM Case Plan

1. On the *Detail SDM Case Plan* window, select the *Add* push button in the *Persons Involved in the Plan* group box.

   If there is a person in the SDM Household that is not currently in the Case Plan, the *Add SDM Household Participants* pop-up window will display. To add that person, select the SDM Household person to add and select *OK.*
   OR
   If there is not a person in the SDM Household that is not currently in the Case Plan, an informational message will display indicating that no new household person was detected.

Remove a Person from the SDM Case Plan

1. Select the person to be removed from the *Persons Involved in the Plan* group box.
2. Select the *Remove* push button.
3. Select *Yes* on the confirmation window to continue.

Enter the Permanency Objective for a Child in the SDM Household

1. Highlight the child from the *Persons Involved in the Plan* group box.
   Note: Children may be multi selected from this list.
2. Select the *Permanency Objective* icon and the *Maintain Permanency Objectives* dialog box displays.
3. Select the Permanency Objective from the drop-down list.
4. In the *Target Date* field, enter the date this objective is planned to have happened.
5. If the permanency objective is anything other than Family Preservation, a Concurrent Plan must be selected from the *Concurrent Plan* drop down list.
6. Enter the Target Date of the concurrent plan.
7. Select OK and the *Detail SDM Case Plan* window displays with the *Permanency Objective* indicated in the *Persons Involved in the Plan* group box.
   Note: Permanency Objectives must be entered for all children in the case plan.

Create a Child Plan

Note: It is mandatory to create a Child Plan for each SDM Case Plan.

1. From the *Detail SDM Case Plan* window, select the *Child Plan* push button or select *Detail>Child Plan* and the *Detail SDM Case Plan Narrative* window displays.
2. Enter the *Goal* narrative text.

   Note: This is a mandatory field and must be saved to retain the Goal.
3. Enter Strategies, Services and Progress for each Plan Goal.
4. Select the *Save and Next* icon to document another Child Plan Goal.
5. Select the *Save and Close* icon when all *Child Plan Goals* have been entered and the *List SDM Case Plan/Child Plan Narrative* window displays with the goals entered.

   Note: Each goal must have strategies, services and progress entered prior to the Case Plan being finalized.

Create a Caregiver Plan

Note: Creating a Caregiver Plan is mandatory for cases of Child Abuse and Neglect but optional for cases of status offenders and juvenile offenders. N-FOCUS does not mandate that the Caregiver Plan be completed to be in "Ready for Review Status.

1. From the *Detail SDM Case Plan* window, select the *Caregiver Plan* push button or go to the Detail Caregiver Plan and the *Detail SDM Case Plan Narrative* window displays.
2. Enter the Goal, Strategy, Services and Progress Narrative.

   Note: This is a mandatory field and must be saved to retain the Goal.
3. Select the *Save and Next* icon to save the goal and add another Caregiver Goal or Select the *Save and Close* icon to save the goal and close the window and the *List SDM Case Plan* window will display with the goals listed.
4. If the *Critical Need* box was checked for any of the goals in the Caregiver Plan, then the Significance SDM Narrative must be entered. This narrative can be accessed by clicking on the *Plan Narrative* icon.
5. Document that the caregiver was informed of likely consequences.
6. Select the *Save and Close* icon the Detail SDM Case Plan/Caregiver Plan Narrative displays.
7. Select the *Save and Close* icon the *List SDM Case Plan Narrative* window displays.
8. Select the *Close window* icon and the *Detail SDM Case Plan* window displays.
9. If a case is a non-court involved case, Child Advocacy Narratives and *Compliance* ratings must be completed.

   a. Select the *Narrative* icon on the *Detail SDM Case Plan* window and the *Search Narrative* window displays.
   b. Highlight Child Advocacy in the subject area box and select *New*.
   c. On the *Detail Narrative* window complete narratives for both items *"Case Plan Compliance (Progress) and Services Description."*
   d. Save and Close after completing the last of the two narratives.

10. Select *Search* on the *Search Narrative* window and the *List Narrative* window displays. Finalize the narratives.
11. Select the *Close* icon.
12. On the *Search Narrative* window, select the *Cancel* push button.
13. On the *Detail SDM Case Plan* window select the *Compliance* push button.
14. Add a *New Compliance Record* by selecting the *Rating* the best describes the family's progress with case plan goals and enter a begin date.
15. Select the *Add* push button
16. Select the *Save and Close* Icon.
17. On the *Detail SDM Case Plan* window save the information by selecting the *Save* icon.
18. Select Actions and Update the Status to "Ready for Review" and the *Confirm Save* window displays.
19. Select *Yes* and the Detail SDM Case Plan is in "Ready for Review" status.

Locate a CFS Case Plan

Previous case plans can be located on N-FOCUS by highlighting a case plan participant's name in the *Program Case Person* box and selecting the case *CFS Case Plan* icon.

Update a SDM Case Plan

1. From the *Detail Program Case* window select the *Case Plan* push button and the *List SDM Case Plan* window displays.
2. From the *List SDM Case Plan* window open the case plan by highlighting the case plan and selecting the open icon or double clicking on the case plan.
3. Once the SDM Case Plan is approved by a supervisor and put in "Final" status, an update to the case plan can be completed by selecting the *Copy Case Plan* icon from the *Detail SDM Case Plan* window.

   Results: A *N-FOCUS Information* window displays advising the previous case plan was copied and changes may be required.
4. Select *OK* and a draft case plan is created with the caregiver and child plans pulled over from the previous SDM case plan.
5. Enter the begin and end date for the SDM Case Plan.
6. Enter the Permanency Objectives for each child.
7. Select the *OK*.
8. Select the *Save* icon on the *Detail SDM Case Plan* window.
9. Update the *Child Plan* by selecting the *Child Plan* push button.
10. Open the *Goal* by highlighting and selecting the open file icon or double click on the goal and the *Detail SDM Case Plan/Child Plan Narrative* window displays.
11. Update strategies, services and progress as needed.

12. Select the Save and Next to update the next Child Plan goal or select the Save and Close to return to the *List SDM Case Plan Narrative* window.
13. Select the *Close* icon.
14. From the *Detail SDM Case Plan* window select the *Caregiver Plan* push button and the *List SDM Case Plan/Caregiver Plan* narrative window displays.
15. Open the Goal by highlighting and selecting the *Open File* icon or double click on the goal and the *Detail SDM Case Plan/Caregiver Plan* window displays.
16. Update strategies, services and progress as needed.
17. Select the Save and Next to update the next Child Plan goal or select the Save and Close to return to the *List SDM Case Plan Narrative* window.
18. Select the *Close* icon.
19. On the *Detail SDM Case Plan* window, if changes from the case plan were a result of a court modification select the *Court Modified* box.
20. Select Actions and Update Status to “Ready for Review” and the *Confirm Save* window displays.
21. Select *Yes* and the Detail SDM Case Plan is in “Ready for Review” status.
22. Select the *Close* icon and the *List SDM Case Plan* window displays with a list of all SDM Case Plans.

    Note: Selecting the *New* icon on the *List SDM Case Plan* window creates an entirely new case plan; it does not update a previous case plan.

Tie the Independent Living Plan

The Independent Living plan must be tied to the SDM Case Plan prior to finalizing the Case Plan. The child must be at least sixteen years of age before N-FOCUS allows the plan to be tied.

To tie the IL Plan to the SDM Case Plan, follow these steps:

1. From the *Detail SDM Case Plan* window, select the child for whom the IL Plan was created from the *Persons Involved in the Plan* group box and the *IL Plan* push button becomes active.
2. Select the *IL Plan* push button.
3. Select the Independent Living Plan involving the child identified and select the blue arrow *Select* icon and a *Confirm Save* message displays.
4. Select Yes to tie the Independent Living Plan to the Case Plan.

   Note: If there are multiple IL Plans, the List Independent Living Plan window will display. Highlight the desired IL plan and select the blue arrow *Select* icon. The confirmation window will then display.

The IL Plan can also be tied by highlighting the child in the Person Involved group box on the *Detail SDM Case Plan* window and selecting Go to Actions>Tie IL Plan.

When the IL Plan is tied, the *IL Plan* push button will be grayed out, and the *Tied IL Plans* push button will be enabled.

Untie the IL Plan

To untie the IL Plan, follow these steps:

1. From the *Detail SDM Case Plan* window, highlight the child in the *Persons Involved in the Plan* group box.
2. Select Go to Actions>Untie IL Plan.
3. A *Confirm Save* dialog box will appear.
    a. Select *Yes* to tie the IL Plan to the Case Plan.
    b. Select *No* to not tie the IL Plan to the Case Plan.

Note: If there are multiple IL Plans, the *List Independent Living Plan* window will display. Highlight the desired IL plan that is currently tied to the Case Plan and select the blue arrow *Select* icon. The Confirmation window will then display.
When the IL Plan is untied, the *Tied IL Plan* push button will be grayed out, and the *IL Plans* push button will be enabled.

INDEPENDENT LIVING PLAN (IL PLAN)

**An IL plan must be created and on N-FOCUS for all wards age 16 and older.

Create a New Independent Living Plan

1. Navigate to the *CFS Detail Program Case* window.
2. Select (highlight) the child for whom you want to add to an IL Plan and the *IL* push button becomes enabled.
3. Select the *IL* push button and the *Detail Independent Living Plan* window displays with the selected child's name in the *Plan Participants* box. The *List Independent Living Plan* window displays if an IL Plan had been previously completed.

   Note: The Begin Date defaults to current date, but can be changed. The date cannot be future dated or set to a date prior to the End Date of another IL Plan.

4. Select the *Save* icon and the *Plan*/*Goals* and *Status History* push buttons enable; the as of date, Updated By information, and the IL Plan Number display.
5. Select the *Plan/Goals* push button and the *Detail Independent Living Plan Goal* window displays in Draft Status.
6. Select the appropriate *Category* from the drop-down box.
7. Enter the Target Date.
8. Enter text in the *Goals* text field.
9. Enter text in the *Strategy* text field.
10. Select the *Save and Next* icon and the *Goals* and *Strategy* text fields and the Target Date will be cleared. You can now write another goal for the same Category or you can select a new Category and write a new goal.
11. Select the *Save and Close* icon and the *List Independent Living Plan* window displays
12. Select the *Close* icon and the *Detail Independent Living Plan* window displays
13. If you want to add another person as a *Plan Participant*, select the black arrow *Select* icon and the *Person Search* window displays.
14. Find the person you want to add as a participant and the *Add Plan Participant* dialogue box displays.
15. Enter the Begin Date for the participant.
16. Select the *OK* push button and the *Detail Independent Living Plan* window displays with new participant in the *Plan Participants* box.
17. Select the *Save* icon.
18. Select Actions – Update Status and the *Confirm Save* dialogue box displays.

19. Select *Yes* and the *Detail Independent Living Plan* window displays with the Status 'Ready for Review.'

    Note: Supervisor will be responsible for setting Status to 'Approved.'

    Note: If School Attendance for the child has not been entered into N-FOCUS an Edit Error message will appear instructing the worker to update school attendance before an update will be allowed. Complete the school attendance information (See Person Detail Section).

20. Return to the *Detail Program Case* window.

Supervisory Approval

Note: The Independent Living Plan requires that a supervisor review the plan and set the plan to Approved Status.

1. Navigate to the appropriate *Detail Independent Living Plan* window that is set in 'Ready for Review' status.
2. Select the *Actions* drop-down menu.
3. Select Update Status and the Independent Living Plan Update Status dialogue box displays.
4. Select the new Status.

   Approved – When Approved, changes can only be made to the Goal(s) Status. Also, if Approved Status is set by a supervisor other than the worker's direct supervisor, use the out select arrow to document the name of that supervisor.

   Revisions Required – Allows worker to update document as needed.

5. Select *OK* and the *Confirm Save* dialogue box displays.
6. Select *Yes* and the *Detail Independent Living Plan* window displays with the *Approved* status and the *Provided Service* and *Progress* push buttons enabled. The IL Plan Goals will also be set the Status of *In Progress*.

   Note: The *Provided Service* push button is designed to be used for the NYTD reporting.

Document IL Goal Progress

1. Navigate to the appropriate *Detail Independent Living Plan* window.
2. Select the *Progress* push button and the *Independent Living Plan Progress* window displays.
3. Select the appropriate Category from the drop-down list and any goals not in 'draft' status associated with the chosen Category will display in the *Goal* list box.

   Note: If a Category has only Goals in 'Draft' status, that Category will not display in the drop-down box.

4. Select (highlight) which Goal you wish to write about.
5. Enter the text in the *Current Narrative* text field.
6. Select *Save and Next* to write about the next Goal in the goal list.
7. Select the next Category from the *Category* drop-down box.

8. Repeat steps 4-6.
9. Select the *Save and Close* icon and the *Detail Independent Living Plan* window displays.

IL Plan Review

When an IL Plan is set to Approved status, the worker is required to review the IL Plan at least every 6 months. An Alert will be provided regarding the Review.

1. Navigate to the *List IL Plan* window.
2. Select (highlight) the IL Plan to be reviewed.

   Note: Only IL Plans that are in Approved Status, but do not have an End Date may be reviewed.
3. Either double click or select the *Open* icon and the *Detail IL Plan* window displays.
4. Select the *Review* push button or *Actions – Review Independent Living Plan* and the *Review Independent Living Plan* dialogue box displays.
5. Enter the Review Date.

   Note: You can change the Reviewed By name by selecting the *Select* icon.
6. Select *OK* and the *Detail Independent Living Plan* window displays with the review information populated.

Modify IL Plan

There are five reasons to modify an IL Plan:

- Add a new IL Plan Goal
- Change the Strategy of existing IL Plan Goal.
- Update Status of and existing IL Plan Goal
- End Date a Plan Participant
- Remove a Plan Participant.

1. Navigate to the appropriate *Detail IL Plan* window.
2. Select *Actions – Modify Plan* and the Status will change to Modified.
3. Select Yes on the confirmation pop-up.

Add a New IL Plan Goal

1. Open the IL Plan and select the *Plan/Goals* push button and the *List Independent Living Plan Goals* window displays.
2. Select the *New* icon (Green Sheet of Paper) and the *Detail Independent Living Plan Goal* window displays.
3. Follow previous steps for creating Goals.

Change the Strategy of Existing IL Plan Goal

1. Select the *Plan/Goals* push button and the *List Independent Living Plan Goals* window displays.
2. Select (highlight) the Goal you wish to Modify.
3. Open the Selected Goal and the *Detail Independent Living Plan Goal* window displays.
4. Enter appropriate text in the *Strategy* text field.
5. Select the *Save and Close* icon and the *List Independent Living Plan Goals* window displays.
6. Select the *Close* icon.

Update IL Goal Status

1. While the plan is modify status, open the Independent Living Goal to update.
2. Select the change in status from the *Status* drop-down box.
3. Select the *Save and Close* icon.
4. On the *List Independent Living Plan Goals* window, select the *Close* icon.

End Date a Plan Participant

1. Select (highlight) the Plan Participant you wish to end.

   Note: The Youth cannot be end dated
2. Select Actions – End Date Plan Participant and the *End Plan Participant* dialogue box displays.
3. Enter the appropriate End Date.

   Note: The End Date cannot be future dated.
4. Select *OK* and the *Detail Independent Living Plan* window displays with the participants End Date.
5. Select the *Save and Close* icon.

Remove a Plan Participant

1. Select (highlight) the Plan Participant you wish to remove.

   Note: The Youth cannot be removed.
2. Select Actions – Remove Plan Participant and the *Remove Plan Participant* dialogue box displays.
3. Enter the appropriate End Date.

   Note: The End Date cannot be future dated.
4. Select *OK* and the *Detail Independent Living Plan* window displays with the participants End Date.
5. Select the *Save and Close* icon.

Print an IL Plan

1. Navigate to the appropriate *Detail IL Plan* window.
2. Select Actions – Print Independent Living Plan and the *Independent Living Plan* dialogue box displays.
3. Answer the Progressive Narratives on Plan question.

   Note: If you answer 'Yes', the Progress Notes will print to the IL Plan document.
4. Set the Progressive Narratives date range.

   Note: If you answered 'No', the date range becomes disabled.
5. Select *OK* and the *Print* dialogue box displays.
6. Select the *Print* push button and the IL Plan prints.

Close an IL Plan

1. Navigate to the appropriate *Detail IL Plan* window.
2. Select Actions – Close Plan and the *Close Independent Living Plan* dialogue box displays.
3. Select *OK* and the *Detail IL Plan* window displays with the End Date entered, the Status changed to 'Closed', and the window status changed to 'Inquiry'.

   Note: When the IL Plan is in 'Closed' status, the Progress Notes and the Provided Service functionality can still be updated.

Document Provided Services

1. Navigate to the appropriate *Detail IL Plan* window.
2. Select the *Provided Service* push button and the *Independent Living Provided Services* window displays.
3. Select the appropriate Month/Year from the drop-down box for which you want to document the Provided Services.

   Note: The drop-down list will display all the Months/Years that the IL Plan has been active.
4. Select (highlight) which Service(s) were provided.
5. Using either the mouse--right click to select *Yes* or *No* OR Select *Actions* and select Mark Yes/Mark No and the letter 'Y' or 'N" will display next to the selected Service.
6. Select the *Narrative* icon.
7. Select the *New* icon.
8. Enter the Occurrence Date and Narrative.
9. Select the *Save and Close* icon.

Create a Readiness Checklist

The checklist is a list of documents and information that may be provided to a youth prior to or near their date of discharge from state custody. The checklist is related to a specific youth and not to a case. The checklist is very flexible in that information can be changed freely and only the most current information is saved in N-FOCUS.

The Readiness Checklist is accessed from the *CFS Program Person Information* window by selecting Detail>Readiness Checklist.

The *Readiness Checklist* window will open to update or add one or more of the 29 items on the list as a document provided to a youth prior to their discharge from the state custody.

The following information appears in the *Program Case Person* group box:

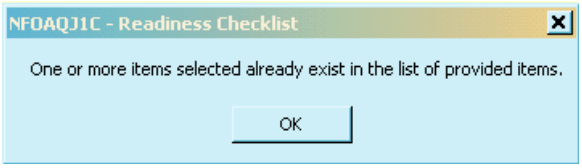
Name – this is the name of the youth for whom the list is being created

Number – this is the system generated id for the youth

To add an item or items to the upper list box the following steps are to be taken:

1. Select one or many of the items in the item list (Lower list box),
2. Enter a date when the item(s) were or will be provided. The date can be future dated in preparation for a scheduled meeting. Once a date is entered, the add push button is enabled.
3. Select the *Add* push button and all of the selected items are added to the upper list box Date provided will be the date entered when adding the item. Item will be the description of the item selected. Last Updated By will display the LOGON ID of the person that added the item to the list.

If one of the items selected to be added to the provided list (Top Box) was previously added then the following message will appear.



All new items will be added and the previously added item will remain in the list unchanged.

Change a Date for a Selected Item

To change the date when an item was or will be provided, follow these steps:

1. Select the item to be updated.

   Only one item can be selected at a time.
2. Select the *Update* push button.

   The *Readiness Checklist – Update Item* dialogue box will open.
3. Change the date.
4. Select *OK*.

The date will change for the selected item in the list.

Remove an Item from the List

To remove an item from the provided list box (Upper Box) follow these steps:

1. Select the item to be removed. (Only one item can be selected at a time.)
2. Select the *Delete* push button.
   The *Readiness Checklist – Delete Item Confirmation* dialogue box for the selected item will open.
4. After confirming this is the correct item select *OK*.
   If *OK* is selected then the item will no longer appear in the provided item list box (Upper List Box).

Signed Copy of Readiness Checklist Option

One of the available selections from the Readiness Checklist is the Signed Copy of Readiness Checklist. The date applied to this item will also appear on the signature lines for the youth and the worker to sign.

The Readiness Checklist can be printed from the CFS Program Case or the Independent Living Program Case. This checklist is saved as a correspondence in whichever program case

Completing the National Youth in Transition Database (NYTD) Survey

The National Youth in Transition Database (NYTD) Survey is a twenty-two (22)-question survey developed by the Administration for Children's and Family (ACF). The purpose of the survey is to help determine outcomes for youth that turned seventeen (17) while in Foster Care.

Youth are selected every three years during the Federal Fiscal Year (FFY) starting with October 2010 – September 2011 (FFY 2011). 17 year old youth are to complete the survey within 45 days of their 17th birth date and when in Foster Care. All youth that complete the survey within this time will be contacted again to take the survey around their 19th birthday and again their 21st birthday.

The survey is to be completed by the youth on a web site that is accessible from the DHHS Website.

Any youth between the age of 16 to 23 and in N-FOCUS can complete the survey. The first page of the survey requires the youth to enter their name, birth date and last 4 of their SSN. The last 4 of the SSN and birth date will be used to verify that the youth was once served by the State.

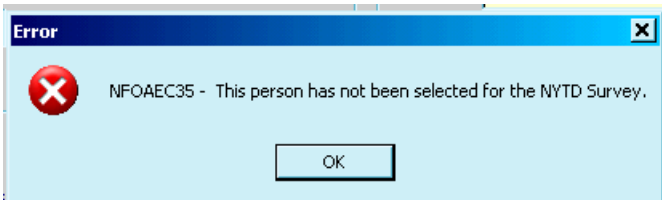
If the Date of Birth and last 4 of the SSN matches a person in N-FOCUS and the Date of Birth indicates that this person is between 16 and 23 years of age on the current date then they will be taken to the survey page after clicking Continue

Once the youth completes the survey and clicks the *Submit* button, the survey and the identification information will be used and compared to the selection list.

The National Youth in Transition Survey Selection is accessed from the CFS Program Person Information window by selecting NYTD Survey Selection from the *Detail* drop-down.

If the youth was on the selection list, their status will be updated on the selection table based upon the submission date to Participated or Did Not Participate and reason for not participating on time.

If the person was not selected to participate in the NYTD Survey the following error message will appear after selecting NYTD Survey Selection from the Detail drop down.



Semi-Annual Report – Staff Responsibility

Before the state submits the semi-annual report in May or November it is required for the state to indicate why a youth was unable to participate in or take the survey on time. To complete this; workers are expected to enter a status reason by taking the following steps.

1. Navigate to the *National Youth in Transition Survey Selection* window in N-FOCUS.
2. Highlight the report period for the youth where they did not participate
3. Select Actions>Update Status.
5. Select the appropriate Status Reason.

The Status Reasons are as follows:

Youth Declined – This status is entered by the worker when the youth has told them that they would not complete the survey. The selection record must be in Did Not Participate status.

Parent Declined - This status is entered by the worker when the parent of the youth has told them that they do not want their child to complete the survey. The selection record must be in Did Not Participate status.

Youth Incapacitated - This status is entered by the worker when they had determined the youth will not be able to participate because they have an illness or medical situation that prevents them from answering the questions. The selection record must be in Did Not Participate status.

Incarcerated - This status is entered by the worker when the youth has been in prison or jail for the entire period in which they would have been able to complete the survey and this situation also prevents them from answering the questions. The selection record must be in Did Not Participate status.

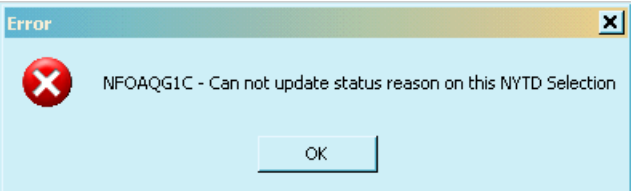
Runaway/Missing - This status is entered by the worker when the youth is unable to participate in the survey because during the report period they were in runaway status during the report period. The selection record must be in Did Not Participate status.

Unable to Locate/Invite - This status is entered by the worker when the youth cannot be located to be invited to participate in the survey. The selection record must be in Did Not Participate status.

Death - This status is entered by the worker when it has been verified that the youth is deceased. The selection record must be in Did Not Participate status.

Participated After the Report Period – This status is entered by the system. When a youth completes the survey but does so after the end of the report period or after their 17th birthday plus 45 days. **THIS SELECTION SHOULD NEVER BE SELECTED BY THE WORKER.**

When a Status reason is entered on the 17 Year Old report period the 19 and 21 Year Old report period are automatically set to the status Not in Follow-up. These records do not require a status reason and attempts to enter a status reason will result in the display this error message.



This same message will appear when attempting to enter a status reason for a youth in the status of Participated. The status of participated is set by the system when a youth submits a survey and has met the reporting criteria.

The submission of a survey by the youth will override any status reason entered by the worker. If the worker entered a reason for not participating and the youth then submits a survey on time then the status will be changed to Participated and the status reason will be removed.

The statuses for NYTD Selection are as follows:

The following statuses require that a status reason for not participating be entered:

- **Did Not Participate** – this is the default status and eventually require a reason for not participating
- **Requires Follow-up** – This status is set for the follow-up records when the baseline Survey record (17 year-old record) is set to the status of Participated

A status reason cannot be entered on the following statuses:

- **Participated** – This status is set when a youth submits a survey within the required time frame
- **Not Required Follow-up** – This status is set for the follow-up records when the Baseline Survey

PROFESSIONAL RELATIONSHIPS

Create New Professional Relationships

1. From the *Detail Program Case* window*, s*elect the *Professional Relationship* icon **(shaking hands).**
2. Select Case Person using black arrow icon.
3. Select Professional using black arrow icon (if person needed not listed contact RD).
4. Select the appropriate relationships type.
5. Enter the Begin Date.
6. If you have more relationships to enter, select *Save and Next* and enter the next relationship; if you are done entering relationships, select *Save & Close*.

End a Professional Relationship

1. From the *Detail Program Case* window*, s*elect the *Professional Relationship* icon **(shaking hands).**
2. From the *List Professional Relationships* window, double click on the relationship you want to end.
3. Enter the End Date.
4. *Save and Close* if this relationship is not continued by another professional; *Save and Next* to add a different professional for this relationship.

View a Professional Relationship

1. From the *Detail Program Case* window*, s*elect the *Professional Relationship* icon **(shaking hands).**
2. Either view from the list the Professional Relationships or double click on a Professional Relationship to view the details.

CORRESPONDENCE

View Correspondence

1. Select the *Correspondence* icon from any window it is available.
2. Select the *Search* push button.
3. Double click on the correspondence you want to open.

Create Speednote

1. On *Detail Program Case* window, select *Correspondence* icon **(white sheet of paper on yellow sheet of paper)**
2. Select *New.*
3. Scroll down and select Speednote-CFS.
4. Select *OK.*
5. In the *Sent To* box, highlight person's name you want to send the Speednote to.
6. Enter narrative in the text field.
7. Select solid blue *Save* icon and stay on the window.

To Print:
1. Return to the *Search Correspondence* window.
2. Search and open the Speednote.
3. Select Actions and the print option.

Create Speednote and Forward to a System Person and Non-System Person

1. Follow 1-6 above.
2. Use the black arrow to select another person.
3. Enter information about person you want.
4. Select *OK.*
5. Highlight the new person.
6. De-select the other person.
7. Enter new narrative beneath previously created narrative.
8. Select solid blue *Save* icon and stay on the window.
9. Select *Non-System Person* push button to create an additional person.
10. Follow same steps as above.

School District Notice

1. From any window it is available, select the *Correspondence* icon.
2. Select *New* push button.
3. Highlight School District Notice.
4. Select *OK.*
5. Select the Purpose.
6. Highlight child.

7. Select *Identify Parents* and highlight the parents.
8. Select *Parental Rights* and select the appropriate radio button.
9. Select the Initial Parent Contact push bar and select the appropriate response.
10. Select Ok.
11. Enter the School District Info box by either typing in or using the black *Select-Out* arrow to complete the following fields :
    a. *Current School District*
    b. *School Currently Attends*
    c. *School District when Child was made a Ward*
12. Close the window.

To Print:
1. Return to the *Search Correspondence* window.
2. Search and open the School District Notice.
3. Select *Actions* and the print option.

Change of Placement Notice

1. From any window it is available, select the *Correspondence* icon.
2. Select *New* push button.
3. Highlight Change of Placement Notice.
4. Highlight the child.
5. Select *Additional Information* push button.
6. Check Notification of Placement Change.
7. Complete necessary information.

To Print:
1. Return to the *Search Correspondence* window.
2. Search and open the Change of Placement Notice.
3. Select Actions and the print option.

Early Development Network Referral

1. From any window it is available, select the *Correspondence* icon.
2. Select *New* push button.
3. Highlight Early Development Network Referral.
4. Select the Referred Organization.
5. Highlight the child and the child's information will appear.
6. Select the *Concerns/Comment* push button and enter information as it applies.
7. Select *OK*.
8. Select the *Save and Close* icon.
9. Select Print on the pop-up to print.
10. Repeat for additional children.

ALERTS

Checking Alerts from Main Menu

1. On *Main Menu* select *Alerts* icon **(red flag with yellow A)**.
2. *Search* or set parameters and *Search*.
3. Double click on the Alert you want to read.

Create a Program Alert to Yourself

1. On *Detail Program Case* window, select the *Alerts* icon.
2. Select *New* push button.
3. Enter both short and more detailed description.
4. Set the display date.
5. Save and Close.

Checking (Opening) Alerts for another Worker

1. *From the Main Menu, s*elect the *Position* icon (lower right next to staff person).
2. Search by Office or Staff Person name.
3. Highlight person.
4. Select *Alerts* icon.
5. Search.

Print Alerts/Clear Alerts

1. From the Main Menu, go to the *List Position Alert* window, highlight the Alert(s) you want to print or delete.
2. Select Actions.
3. To print, select *Print Alert*; To clear, select *Clear Alert.*

FAMILY RELATIONSHIPS/CHILD CARE CASES

Checking Out a Case/Expert System

1. On *Detail Master Case* window, select Actions.
2. Select Check-Out Case.
3. Status will change to Inquiry.
4. Return to the *Detail Master Case* window.
5. Select *Q&A Expert System* icon.
6. Highlight name of case checked out.
7. Double click or use *Open* icon.
8. *Navigator* window will appear.

Process Family Relationships

1. On *Navigator* window, double click on *Data Collection*.
2. Double click on Non Financial.
3. Double click Family Relationships.
4. Select Add or Update (lower right).
5. Highlight a person in the first box with a white background.
6. Highlight a relationship type in the middle box with a white background.
7. Highlight the person in the last box with a white background whose relationship is this type with the first person highlighted.
8. Either select the *Next* Button to enter more relationships or *OK* if this is the last relationship to process.
9. *Close* icon (back out) on *Navigator* window.
10. Answer *Yes* to *Save* and *Return to Status* window.
11. Proceed to “Checking in a Case” directions.

Checking In a Case

1. From the *Navigator* window, highlight the *Master Case*.
2. Select Actions.
3. Select Check-In Case.
4. Select *OK*.
5. Select *Master Case* icon.
6. Status is back to Update.

Creating a Child Care case for a State Ward in out of home care. (Without Regard to Income)

1. From the *Detail Master Case* window, select Actions – Check-Out Case.
2. Select *OK*.
3. Select the *Expert System* icon. **(Blue Q & A)**
4. Select (highlight) the desired Master Case, and double click or select the *Open* icon.
5. Expand the *Data Collection* Task.

6. Expand the *Non-Financial* Task.
7. Expand the *Case Maintenance* Task.
8. Double click on Case Actions.
9. Select (highlight) the current month.
10. Select the *OK* Button.
11. Select the *Add* push button.
12. Select (highlight) the CC Program Case.
13. Select (highlight) the child(ren) to be added to the Child Care program case.
14. Enter the appropriate Application Request Date and Application Received Date.
15. Enter the Program Case Name if needed.
16. Select the *OK* push button.
17. Select the *Save* icon.
18. Expand the Eligibility Task.
19. Double click Budgeting.
20. Select (highlight) the CC Case Row to process.
21. Click the *Process Selected* button to process only the Child Care program case.
22. Select the Service Need Reason from the drop-down list.
23. Click the *OK* button to process the Child Care Program case.
24. Authorize the budget by highlighting the starred (*) line to enable the *Authorize* button. Click *Authorize*.
25. Click the *OK* button to exit the window.
26. Select *OK*.
27. Click the *OK* button to process the Child Care Program case.
28. Authorize the budget by highlighting the starred (*) line to enable the *Authorize* button. Click *Authorize*.
29. Click the *OK* button to exit the window.
30. Select the *Close* icon.
31. Select the *Yes* push button.
32. Select (highlight) the Master Case.
33. Select the Actions Menu; select Check-In Case.
34. You are given a message to tell you that the check in was successful.
35. Select the *Master Case* icon **(Blue M)** in the right corner to return to the *Master Case* window or select the *Menu* icon to return to the Main Menu.
36. Open the Child Care Program Case.
37. Assign the Program Case.
38. Return to the *Detail Master Case* window.

Creating a Child Care case for a State Ward in the parents' home. (Bypass WI)

1. From the *Detail Master Case* window, select Actions – Check Out Case.
2. Select *OK*.
3. Select the *Expert System* icon. (Blue Q & A)
4. Select (highlight) the desired Master Case, and double click or select the *Open* icon.
5. Expand the Data Collection Task.

6. Expand the Non-Financial Task.
7. Expand the Case Maintenance Task.
8. Double click on Case Actions.
9. Select (highlight) the current month.
10. Select the *OK* button.
11. Select the *Add* push button.
12. Select (highlight) the CC Program Case.
13. Select (highlight) all the family members to be added to the Child Care program case.
14. Enter the appropriate Application Request Date and Application Received Date.
15. Enter the Program Case Name.
16. Select the *OK* push button.
17. Select the *Save* icon.
18. Expand the Eligibility Task.
19. Double click Budgeting.
20. Select (highlight) the CC Case Row to process.
21. Click the *Process Selected* button to process only the Child Care program case.
22. Review the people shown in the *Person* box for appropriate roles.
    a) Only children with the role of “Participant” in the CFS case or SA/SG program persons should be "Participants" in the Child Care case.
    b) Parents may be in the case as "Financially Responsible".
    c) Siblings that do not have the role of “Participant” in the CFS case should have the role "Non-Participant Child". Select the child, and then double click on the role, Non-Part Child. A window will pop-up for selection of the change reason.
23. Click on the *Bypass WI Determination* check box.
24. Select the Service Need Reason from the drop-down list.
25. Click the *OK* button to process the Child Care Program case.
26. Authorize the budget by highlighting the starred (*) line to enable the *Authorize* button. Click Authorize.
27. Click the *OK* button to exit the window.
28. Select *OK*.
29. Click the *OK* button to process the Child Care Program case.
30. Authorize the budget by highlighting the starred (*) line to enable the *Authorize* button. Click Authorize.
31. Click the *OK* button to exit the window.
32. Select the *Close* icon.
33. Select the *Yes* push button.
34. Select (highlight) the Master Case.
35. Select the Actions menu; select Check-In Case.
36. You are given a message to tell you that the check in was successful.
37. Select the *Master Case* icon **(Blue M)** in the right corner to return to the *Master Case* window or select the *Menu* icon to return to the Main Menu.
38. Open the Child Care Program Case
39. Assign the Program Case.
40. Return to the *Detail Master Case* window.

View Eligibility Summary

1. From the *Detail Master Case* window, click on the *GOTO* menu, and select the *Eligibility Summary* option.
2. Expand the line you wish to view. (click the + next to the last name).
3. Double click the line of eligibility you wish to view.
4. Double click on Unit Size.
5. Exit windows to return to the *Detail Master Case* window.

Close a Child Care Program Case

1. From the *Detail Master Case* window, select Actions – Check-Out Case.
2. Select *OK*.
3. Select the *Expert System* icon. **(Blue Q & A)**
4. Select (highlight) the desired Master Case, and double click or select the *Open* icon.
5. Expand the Case Maintenance task.
6. Double click on the Case Action task.
7. Select the appropriate month to close the Child Care case.
8. Select *OK*.
9. Select the *Close* push button.
10. The *Close Case Actions* dialogue box displays.
11. Select (highlight) the CC Program Case.
12. Select the Closure Reason from the drop-down list.
13. Answer the Out of Household question.
14. Answer the Close this Month Only question.
15. Select the *OK* push button.
16. Return to the *Case Status* window and check in the case.

Create a Child Care Service Authorization

1. From the *Units and Rates* window, select the *CC Schedule* push button.
2. Enter the Child Care Schedule as appropriate.
3. Select the *OK* push button to proceed.
4. Highlight the appropriate rate line in the *Units and Rates* list box.
5. Select the *Adjust U/R* button in order to save the changes.
6. Select the *Save and Close* icon.
7. Select the *Save and Close* icon.
8. Select the appropriate Print option.
9. Select *OK.*
10. Select *Print.*
11. Close the *Service Auth List* window to return to the *Detail Program Case* window.

SERVICE REFERRAL

DO NOT send a service referral in DRAFT status

Create Service Referral Using Catalogue

1. On *Detail Program Case* window, select the *Service Referral* icon **(Green Telephone).**
2. Select *Name* black arrow - highlight person.
3. Select *OK.*
4. Select *Service* black arrow.
5. Leave all blank except Program.
6. Set Program to Children and Family Services and *Search*.
7. Highlight service.
8. Blue arrow back.
9. Select *Provider* black arrow.
10. Enter information.
11. Search.
12. Blue arrow back if necessary.
13. Enter remaining data.
14. *Save* with the solid blue icon.
15. Select the *Narrative* icon.
16. Select *New*.
17. Enter text for all four item types.
18. *Save and close* after the last narrative is entered.
19. Finalize the narratives.

Create Service Referral Without Using Catalogue

1. On *Detail Program Case* window, select *Service Referral* icon **(Green Telephone).**
2. Select *Name* black arrow - highlight person.
3. Select *OK.*
4. Click Misc service box.
5. Type in name of service.
6. Select *OK.*
7. Enter remaining data.
8. Save with the solid blue icon.
9. Enter narrative.

CONTRACTED ORGANIZATION

Locate a Contracted Organization Assigned To a Child

1. Navigate to the CFS *Detail Program Case* window.
2. Highlight the state ward and select the *Contract Agency* icon.
3. View the information and close when done.

Document a Contracted Organization Assignment

1. Navigate to the Detailed CFS Program Case window.
2. Highlight the child assigned to the organization.
3. Select the *Contract Agency* icon.
4. Enter the date this occurred.
5. Select “Legacy Child” or “New Child” from the *Role* drop-down box.
6. Select the organization assigned.
7. Select the *Add* push button.
8. Save and Close.

LEGAL ACTION / COURT REPORT

Create New Legal Action (Hearing)

1. On *Detail Program Case* window, highlight all *Program Case Persons* included in legal action.
2. Select Actions.
3. Select Children and Family Services.
4. Select Create Legal Action.
5. Highlight ward in Participants group.
6. Select *Scales of Justice* icon.
7. Enter Docket and Page numbers (Check the Change Docket and Page Number for all Participants if it applies).
8. Enter Petition Type.
9. Enter Adjudication Status.
10. Enter All Dates.
11. Enter Court Information.
12. Enter Legal Agents.
13. Save & Close.

Add Hearing Results to Existing Legal Action

1. On *Detail Program Case* window, select *Legal Action* push button.
2. Select *Search*.
3. Double click on the desired petition.
4. Review information for accuracy.
5. Enter Hearing Results (on the bottom of the window).
6. *Save* (solid blue icon).
7. Stay on *Detail Legal Action* window.
8. Select *Narrative* icon.
9. Select Subject Area: Legal Action.
10. Select New.
11. Drop-down and enter the item of *Hearing Results*.
12. Enter the Narrative and Occurrence Date.
13. Select the appropriate *Save* icon.
14. After entering *Hearing Results Narrative*, save and return to *Detail Legal Action* window.
15. Solid blue *Save* information.
16. Create a New Hearing for the same Petition by selecting Actions.
17. Select New Hearing.
18. Enter the Hearing Type, date and time.
19. Save & Close.

The Court Report

Before starting a Court Report, do the following:

- Make sure school attendance is updated.
- Make sure Professional Relationships exist and are current.

Court Report-Person Narratives (Specifically about the ward)

1. On *Detail Legal Actions* window, select the *Court Report* icon.
2. Highlight the ward.
3. Select *CFS* icon (CFS with stick person).
4. On the *CFS Program Person Information* window, select the *Narrative* icon.
5. Highlight Subject Area Court Report-Person.
6. Complete all 7 Narratives about the ward:
    - Reasonable Efforts
    - Rationale for Placement
    - Development/Education/Vocation
    - Medical Condition/Needs
    - Behavior/Relationships
    - Psychological Conditions/ Needs
    - Tribal Notification/Contact
7. *Save & Close* after the last narrative is completed.
8. Repeat for all wards.

    Note: The Court Report-Case Person narratives can also be accessed from the *Detail Program Case* window, highlight the ward, select the *Program Person* push button, and then start from #4 above.

Court Report-Case Narratives (About the whole family/Case)

1. On *Detail Legal Actions* window, select the *Court Report* icon.
2. On the *Court Report* window, select the *Narrative* icon.
3. Highlight the Subject Area Court Report-Case.
4. Complete the Narratives about the Case:
    - History of Previous Service Intervention
    - Parent/Child Visitation Contacts
    - Visitation Plan and Modifications
    - Child Support
    - Summary
    - Recommendations
    - Addendum
5. *Save & Close* after the last narrative is completed.

Child Information

1. From the *Court Report* window, highlight the ward.
2. Select the *Child Information* button.
3. Select answers as appropriate.
4. Select *OK*.

Reasonable Efforts

1. From the *Court Report* window, highlight the ward.
2. Select the *Reasonable Efforts* button.
3. Select the appropriate response.
4. Select *OK*.

Parental Rights

1. From the *Court Report* window, highlight the ward.
2. Select the *Parental Rights* button.
3. View the information for accuracy.
4. If the information is correct, select *OK*. If the information is not correct, select *OK*, go to the Expert System and change.

Additional Worker

1. From the *Court Report* window, select the *Add* button in the *Additional Workers* box.
2. Enter the Name, Title, and Office of the additional worker.
3. Select *OK* if there are no more additional workers or select *Add* to add another.

Print the Court Report

1. On the *Court Report* window, select *Actions*.
2. Select either Print Court Report Draft or Print Court Report Final.
3. The *Print* dialogue box displays, select *Print.*

   Note: If you want to review the Court Report after it has been printed in Final Status you will need to Search in Correspondence.

Tie a Case Plan to the Court Report

Note: A Case Plan may only be tied to the Hearing Types of Disposition, Review or Permanency Hearing.

1. On the *Detail Legal Action* window, select the Actions.
2. Select Tie Case Plan.
3. Select (highlight) the *Case Plan* that the Court approved.
4. Select the *Return* select arrow icon.
5. Select *OK.*

SUPERVISORY APPROVAL

All of the SDM Assessment require a supervisor review the N-FOCUS data and set the assessment to Final Status. The steps to set the status to final are the same regardless of which assessment is being reviewed, although the various window names will be based on which assessment is being reviewed.

Following are the steps to complete the supervisory approval:

1. Navigate to the appropriate *SDM Assessment Detail* window that is in “Ready for Review Status”.
2. Select the *Review Narrative* push button and the *SDM Narrative* window displays.
3. Enter the narrative text regarding the Supervisor review and ICWA notifications.
4. Select the *Save and Close* icon and the *SDM Assessment Detail* window displays.
5. Select the Actions – Update Status and the *SDM Assessment Detail* window - *Update Status* dialogue box displays.
6. Select the new Status.

   Revisions Required – allows worker to update document as needed.

   Final – change/updates cannot be made. Also, if Final Status is set by a supervisor other than the worker’s direct supervisor, use the out select arrow to document the name of that Supervisor.
7. Select *OK* and the *Confirm Save* dialogue box displays.
8. Select *Yes*.

   Note: If required information has not been documented, the *Status Change Edit Errors* dialogue box displays. All of the edit errors must be corrected in order to set the status to Final.

   Note: The Supervisor Narrative is a requirement for any assessment where a worker can override the Scored Risk Level and if an override was applied.