Improving Outcomes for Children and Families

A Comprehensive Guide on Case Management Practice Using STAAND

From the Deputy Director for In Home and Out of Home Care

I'm very excited to welcome everyone to managing cases in STAAND!

The CFSA teams that developed our new system (including many of you!) worked hard to create efficiencies in documentation, planning and reporting. I'm confident you will appreciate these improvements, and that they will give you more time to do the impactful clinical work with children and families that brought you to child welfare in the first place.

Change is always hard, and learning to use this new system will be no exception. But I know that as a team we can successfully make the transition.

This practice guide will help you – it's a comprehensive set of information about what's in STAAND and how to use the system. It should answer many of your questions. Here are my asks of you:

- Keep an open mind!
- Do some practicing before you tackle a task with a pressing deadline.
- If you get frustrated, ask for support. There are many ways to get hands-on support with STAAND (not just the helpdesk!).
- Tell us how it's going. STAAND will be rolled-out over time, and there will be opportunities to adjust things that aren't working the way we want them to -- but we have to know what those things are.

Thanks for all you do every day to serve and support our city's most vulnerable.

Best,

Ann

The Elements of Case Management Practice in STAAND

This compilation of tip sheets on case management practice will support CFSA staff in using STAAND to help children and families achieve desired outcomes. The tip sheets are organized to mirror how cases are displayed and navigated in STAAND.

General Information about a Case:

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- Persons, Case Persons & Relationships
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- Missing/Absent/Abducted youth
- STAAND Short Cuts for Case Management
- Using STAAND AI to support your case management work

General Information about a Case

STAAND Language

Why is Some of the Language in STAAND Different?

Developing STAAND has given CFSA the opportunity to take a close look at our language and terminology, and make sure it is not only current, but reflects the agency's mission and values. For example, STAAND strives to be a gender-neutral system that accounts for same sex parents and does not assume that the mother is always the "primary caregiver" in a family.

Which Common Terms are Different in STAAND?

In…	Out…
Separation	Removal
Family Network	Collateral
Parent/Acting as Parent	Primary or Secondary Caregiver
Absent	In abscondence
Aging-Out	Emancipating
Person or Case Person	Client
Intake	Hotline Call
Referral	Investigation
Transfer Staffing (for Separation)	Removal RED Team
Family Roadmap	FTM Plan
Case Plan	Service Plan
Case Plan	Child or Family Case Plan

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Case Types in STAAND

What are Case Types?

CFSA has two main case types: **In Home (IH) cases**, in which neglect is substantiated, but the CFSA Investigator and/or the court determines a child can remain safely at home with services and support; and **Out of Home (OOH) cases** – of which there are various types— in which a child has been separated from their family and placed in foster care.

Case type determines what kinds of visits, assessments, plans, reports and other activities are conducted on a case. The activity requirements for each type of case are built into STAAND and will automatically appear on a Social Worker's dashboard and/or in their Task List.

All In Home cases are either:

- **Non-court involved.** When a family is not under court oversight and agrees to work with the IH team to resolve safety concerns. Or,

- **Court involved.** When the court orders Protective Supervision for a family, the IH team provides case management while the court retains oversight.

There are five types of case that are managed by an OOH SW and team:

- **Standard OOH cases.** When a child or youth has been separated from their family and placed in foster care, it is a standard Out of Home case.

- **Post Permanency cases.** When a finalized adoption or guardianship is at risk of disruption and a possible re-entry into foster care, a case is opened and managed by the Permanency Specialty Unit (PSU).

- **Safe Haven Baby cases.** When a newborn baby is abandoned in the hospital and requires a pre-adoptive placement, the case is managed by the Permanency Specialty Unit (PSU).

- **Refugee Minor cases.** When a youth from another country enters the United States without a parent or responsible adult, a case is opened and managed by CFSA's partner agency Lutheran Social Services (LSS).

- **Voluntary Placement cases.** When parents are seeking specific, time-limited support from CFSA, they can voluntarily place a child in foster care for 90 days. The case is managed like a standard Out of Home case, but there is no separation or court involvement.

Neither an IH nor OOH case, CFSA also manages **Out of Town Inquiry (OTI) cases.** When a non-CFSA child is in foster care in another jurisdiction, and a potential permanency resource is found in DC, the

CFSA ICPC and Licensing Units work to license that family. Following placement, a Permanency Specialty Unit Social Worker is assigned to complete monthly visits with the child and provides quarterly reports to the jurisdiction from which the child came, but all other work on the case is handled by the sending jurisdiction.

How is a Case Type Selected in STAAND?

Case Types are most often selected by the Investigator upon creation of the case. For Post Permanency, Safe Haven Baby, Refugee Minor, or Out of Town Inquiry cases (which do not come from an investigation), the case type is selected by the manager who is creating the case.

How Does a Case Type Get Changed?

There are specific circumstances in which an open case is re-assigned to a different program area, and the case type (and Social Worker assignment) must therefore change:

- **Separation on a PSU or IH case.** When a separation is approved on a Permanency Specialty Unit or IH case, the case type automatically changes to OOH and appears on the OOH PA's dashboard for assignment.

- **OOH to IH.** If, following a separation, the court orders Conditional Release, the case will become an IH court-involved case. In the future, based on this change in legal status, the case-type change should be automated. In the meanwhile OOH manager manually changes the case type to IH. Depending on case circumstances, the IH case may remain with the OOH SW for continuity, or it can be re-assigned to an IH team.

- **PSU to IH.** When a Permanency Specialty Unit case requires on-going case management, the PSU manager changes the case type to IH and end dates the current PSU Social Worker assignment. After these steps, the case will appear on the IH Program Administrator's dashboard so it can be assigned to an IH team.

A technical User Guide with step-by-step tip sheets, including instructions on managing case types, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Case Creation, Assignment and the Case Team

How are Cases Created and Assigned?

Almost all In Home and Out of Home cases are created by the Investigations team through a process called "Case Connect." At Case Connect, the Investigator can either create a new case, reopen a closed case, or connect the investigation to an existing case. They then select the case type and identify any language needs.

When the Case Connect is approved by the Investigations Supervisor, the IH or OOH case is created and is automatically sent to the IH or OOH Program Administrator's dashboard for assignment down through the chain of command.

OOH cases may include a separate Child Responsibility Social Worker assignment if siblings are not placed together.

When a case is created (whether new or re-opened), it contains all the information a Social Worker needs to begin their work, including:

- The people and households that were part of the investigation
- Links to previous case episodes or related cases (Click HERE for detail about case mining)
- Other work undertaken during the investigation that remains relevant on the case, such as services ordered, assessments or Family Roadmaps completed, or outstanding Tasks.

NOTE: When case persons are adjusted (either new people are added to a case or others removed), the system will automatically prompt the worker to make a clinical decision about whether any plans or reports need to be updated accordingly.

If a case does not come from an investigation (i.e., it is a Post Permanency, Refugee Minor, Out of Town Inquiry or Safe Haven Baby case), the Unit manager creates the case and assigns it to a member of their team.

What is "Designated" Assignment Status?

Once a case has been "connected" from an investigation, even though the receiving team has identified a Social Worker who will be assigned to the case, the Investigator retains case assignment (and the case Social Worker is considered "designated") until the following transfer activities have taken place:

- **For IH cases:** the IH Social Worker is "designated" until completion of a Pre-Case Transfer Staffing (PCTS) and Partnering Together Conference with the family (PTC). Click HERE for detail on this process.

- **For OOH cases:** the OOH Social Worker remains "designated" until completion of a Case Transfer Meeting (formerly known as a "Removal RED" team meeting).

When these criteria are met, documented in STAAND, and approved by a supervisor, the system automatically updates the IH or OOH Social Worker's assignment status from designated to assigned.

How are Cases Re-Assigned?

During the life of a case, many circumstances can lead to a temporary or permanent change in Social Worker assignment, such as: extended leave or departure from the agency; change in an OOH child's placement location; progression to the adoption unit, etc.

Changes in case assignment require formal communication between the sending and receiving Social Workers which is documented in a Case Transfer Summary. Click here for more about completing a Case Transfer Summary in STAAND.

Who is Assigned to the Case Team?

In addition to the primary assigned Social Worker, many other CFSA staff members can be assigned to a case to support the work. These include: a Nurse Care Manager, a PEER, a Family Support Worker (FSW), an FTM coordinator, a Subsidy Worker, an Adoption Recruiter, an Education Specialist, among others.

To support coordination and collaboration across this team, STAAND displays the full list of staff who have been assigned to a case. The assigned AAG (though not a CFSA staff member) is also visible on this list.

A technical User Guide with step-by-step tip sheets, including instructions on case creation and assignment, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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The Case Transfer Process

What is the Case Transfer Process and When Does it Happen?

Changes in case assignment always require communication and knowledge transfer between the sending and receiving teams, so that the receiving team is fully prepared to take-on the case. The circumstances in which a transfer happens include:

- Creation of a new IH or OOH case from an investigation
- Separation on a Post Permanency or IH case
- When a Social Worker goes on extended leave or departs from the Agency
- When a change in an OOH child's placement requires a child responsibility assignment
- When an OOH case is progressing to adoption.

Knowledge is documented and transferred between teams in the "Case Transfer Summary" — a form in STAAND that displays all of the people on the case, and gathers critical clinical information, such as the reasons for agency involvement; the challenges and protective factors (and their impact on the child); case complicating factors, special needs, grey areas and well-being details.

> ***NOTE:*** if a Voluntary Placement case is being transferred from an Investigation to the OOH team, even though there has been no separation, the type of transfer summary is: Separation (Inv to OOH)

Given the importance of providing robust information when transferring a case, the Transfer Summary must be approved by the receiving team's Supervisor before it can be finalized, and the transfer completed.

In addition to participating in the Transfer Summary meeting, the receiving Social Worker is also expected to review the full family history. Click here for steps on case mining in STAAND.

Creating Tasks during a Transfer Staffing

STAAND captures a running list of tasks that a Social Worker, or any CFSA staff member working on a case, is responsible for completing (click here for more information about tasks). During a transfer staffing, the scribe can document high-priority, transfer-specific tasks, which will then appear on the dashboard of whomever is assigned to the task. For example, for a separation staffing, since a Family Time Event (formerly "parent-child visit") should take place within 72 hours of the separation, a task to schedule that visit can be created and assigned to the separating team.

Transfers from Investigations to In Home: Additional Steps!

When an In-Home case is being opened due to a substantiation, the case transfer process should maximize continuity, support and engagement for the family as the team is changing. There are two time-sensitive steps for achieving this:

- **A Pre-Case Transfer Staffing (PCTS)** includes both the Investigating and Case Social Workers and Supervisors, as well as a nurse, if needed. Efforts should be made to conduct this staffing *within three business days of the IH SSW designating the case to an IH SW.* The PCTS is documented in STAAND using the Case Transfer Summary form, which is initiated by the Investigating team and finalized by the In Home team during the PCTS. NOTE: finalization includes supervisory approval by the IH team. An important element of the PCTS is transferring knowledge about who has been identified as a CKP for the children.

- **A Partnering Together Conference (PTC)** includes the Investigative and IH Social Workers and the family. Efforts should be made to hold the PTC *within three business days of the PCTS.* The Investigative and IH Social Workers are required to make at least two attempts to complete a PTC with the family. The PTC is documented in STAAND by the IH worker, using Contact Notes. If the PTC does not happen, the IH managers can manually move the case to assigned status.

How is the Investigations-to-IH Transfer Process Monitored in STAAND?

When both the PCTS (and resulting Transfer Summary) and PTC are completed, STAAND will automatically change the In Home Social Worker's case assignment status from "designated" to "assigned."

If the PCTS has not been completed, and/or two PTCs have been attempted but not completed, the Investigations and In Home Supervisors will receive an email elevating the situation for review. The In Home Supervisor (and chain of command) will also see cases that are in "designated" status on their dashboards.

Once a clinical determination has been made, the IH Supervisor can manually change the assignment status to "assigned," or can seek review by a PM.

A technical User Guide with step-by-step tip sheets, including instructions on the case transfer process, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Reviewing Intakes and Investigations

What Information can I see on an Intake or Investigation?

In STAAND, IH and OOH Social Workers can review all Intake (formerly Hotline) and Investigation information related to their case. Intake information is included with the Investigation, and it can all be viewed from a case in these locations:

- A link to the originating referral (the investigation that led to the current open case) is available in the "Case Details" section of the General Tab on a case.

- Previous (or subsequent) Intakes and Investigations are available in the "Related Intakes and Investigations" section of the General Tab on a case.

When reviewing an Intake and/or Investigation, the following information is available:

- **Intake Details:** Information from the hotline call, including reporter narrative and screening decision.

- **Allegations:** A list of all alleged maltreaters, victims, allegations, and findings.

- **Notes and Documents:** This includes Contact Notes, Documents (such as the Investigation Summary), Search Requests (DSU and DCAS), and notes from Clinical Consultations. **NOTE:** If an Investigation Summary isn't in the Documents section of the investigation, you can generate one at any time by clicking the "Generate Investigation Summary" button in the ribbon.

- **Assessments & Plans:** Home Assessments, Support Plans, Danger & Safety Assessments, and Informal Family Planning Arrangements (IFPAs). The Concurrent Kin Plan (CKP) identified during an investigation is visible on the case person record.

- **Services:** All service requests made during the Investigation and their statuses.

- **Legal:** Complaints, Separation records, PPCO requests, Community Papering Consultations, Notices for a family to appear in court, and any GALs assigned.

- **Closure:** Investigation Closure Summary.

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Case Mining

What is Case Mining and How Do I Do It in STAAND?

Whenever an IH or OOH Social Worker is assigned a case, researching the details of the family's past involvement with CFSA is a critical (and required) step. "Case Mining" provides insights into the family's strengths and challenges to guide engagement and case planning. It can also surface potential permanency resources for a child in Out of Home care, or CKPs for a child on an In Home case.

STAAND makes case mining easy. At the General Tab on a case you will find:

- **Case episodes.** When a case closes and then re-opens, the re-opening date starts a new episode of the family's involvement with CFSA. The episode is always visible in the top right corner of the screen. In addition, when reviewing material on a case (e.g., a case plan or court report), the display grid includes the episode during which the material was created.

- **Linked and historical cases.** At the general tab on the case, you can find:

    - *Case history:* For all previous cases, the case type, open and close dates, closure reason, and assigned Social Worker. Clicking into an entry in this grid displays more detail, including the case closure summary.

    - *Related Intakes & Investigations:* All hotline calls, dates and screening decisions, as well as Investigation findings and summaries.

    - *Related Cases:* Cases in which a person on your case is (or was) involved in another case in a different role. For example, when a parent on your case is a member of the Family Network on another case, or when a parent on your case was a child on a previous case, this is considered a related case.

- **Case Transfer Summaries.** The Case Transfer Summary grid houses the summaries of all transitions on the case, whether from an Investigation to an IH case; from a separation to an OOH case; or within a unit or program.

- **Previously-assigned team members.** The case team grid can be filtered to show which members of the CFSA team have been assigned to the case over time.

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Related Adoption and Guardianship Cases

What is a Related Adoption or Guardianship Case?

When a permanency resource files an Adoption Petition or Guardianship Motion for a child in foster care, the court creates a separate Adoption (ADA) or Guardianship (GDN) case for that child, linked to the child's main court case. In STAAND, these are called Related Adoption or Guardianship Cases.

On the related Adoption or Guardianship case, the Social Worker will produce all Adoption- or Guardianship-specific court reports (the Adoption Interim Report, Adoption Status Report, Adoption Final Report and Guardianship Final Report).

Court hearings or trials on the adoption or guardianship case do not come into STAAND automatically (as do other types of hearings, such as a permanency hearing). Instead, they must be entered manually on the case, at the legal tab using the "+new hearing" command.

All other case management activity — such as writing Permanency Hearing reports, requesting services, entering contact notes, or doing case plans — is done on the child's main court case (aka their "neglect case").

> ***NOTE:*** The SW can easily identify which case they are working on. In the upper left corner of the screen, the name of the case will either include the ADA or GDN case number (if so, the SW is working in that case) or it will simply show the case name (if so, the SW is working in the main court case).

Even though a child will have both an adoption (or guardianship) case and a neglect case, for caseload purposes, these count as one case.

How are Adoption or Guardianship Case created in STAAND?

<u>Adoption Cases</u>

Delays in updates to the court's data system mean that Adoption cases must be created in STAAND manually.

When a petition is received at CFSA (via US mail or email), the CCMS Subsidy Eligibility Specialist manually creates the Adoption case, adding the date the petition was filed and the names of the petitioners, and uploading the petition to the case. The Specialist sends an email to the Case Management, Subsidy, Adoption Recruitment and Re-licensing teams notifying them of the petition and the new ADA case in STAAND.

<u>Guardianship Cases</u>

Delays in updates to the court's data system mean that Guardianship cases must be created in STAAND manually.

When the AAG receives the motion, they alert the CCMS Subsidy Eligibility Specialist as well as the Case Management, Subsidy, Adoption Recruitment and Re-licensing teams. The CCMS Subsidy Eligibility Specialist manually creates the Guardianship case, adding the date the motion was filed and the movants, and uploading the motion to the case.

Where do I find Related Adoption and Guardianship Cases?

On the General Tab on a case, there is a Subsection called "Related Adoption or Guardianship Cases" where these cases are listed. To go to that case (to produce a court report, for example), simply double click on it.

You can get detailed instructions on how to create a related Adoption or Guardianship case from within STAAND in the "Steps" area of CORA, the system's AI assistant. Click HERE for a tip sheet on using CORA.

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Documents and Artifacts on a Case

What Kinds of Documents and Artifacts Can be Attached to a Case in STAAND (and where can I find them)?

Many different kinds of documents and artifacts can (and should) be part of a case record – from plans and reports, to educational or medical information, to photos of a child or family. In STAAND, documents and artifacts fall into three categories:

Type #1: Documents you create from within the system.

Any work product that is created from within STAAND (such as a case plan, a court report, or a complaint), and is finalized or approved, is automatically attached to the case as a document, and visible at the documents tab.

Work products that are specific to a case person (such as a Youth Transition Plan or an assessment) can be viewed on the case person or person record at the documents tab as well.

Type #2: Form letters or documents with pre-populated case information.

Two types of form letter or document can be opened from a case in STAAND with pre-populated information: 1) a Safe Haven Agreement which can be found on the case person in the top ribbon; and 2) authorization (release of information) forms, found on the "Authorizations" Tab, which is under the Related Tabs on the case.

> ***A NOTE about "Ward letters."*** Resource Parent Authorization letters (known as "Ward Letters") that contain pre-populated information are still under development in STAAND. In the meanwhile, click HERE for the current template. Once you have completed the Ward Letter, upload it to the documents on the case, so others will have access.

Type #3: External forms and documents that are relevant to the case.

Any form or document that is completed outside of STAAND – such as a report card or an Assessment Center referral or report — can be uploaded to the case, case person or person. This also includes photos of children and families.

To avoid having to upload a single document to multiple locations, it is recommended that you upload to the case and add the people who are the subject of the document (called "participants") to the document. STAAND will then automatically add that document to those people's case person and person

documents lists. For example: if an attendance record is for several children, add all the children as participants, so the attendance record will be visible not only at the case level, but also on their individual case person and person records.

Sending Documents

In STAAND, any document or artifact on your case can be printed directly from the system, or exported to your files so you can attach it to an email or send it by text.

Once a document (like a case plan or court report) is finalized or approved, the system will automatically make a PDF version available at the Documents tab, so that it can be printed or exported.

Before a document is final, you can generate a PDF to review it, or send it to others for review, by using the "Generate PDF" button in the ribbon.

Where Can I Find Commonly-Used Case Management Forms?

STAAND has a repository of up-to-date case management forms and guides -- no more digging in desk drawers for a possibly-out-of-date copy of the Medicaid termination form, the birth certificate request form, the 1:1 referral form or others!

Follow these steps to find the forms you need:

1. In the Case areas of STAAND, in the left sidebar under "Help," click "Forms & Guides."
2. Click on this icon ⌄ to find "Case Management Forms & Guides"
3. Use the "Filter by Keyword" search box in the right corner to find the document you want.

Once you have saved the document to your own files, and added the pertinent case information, be sure to upload it to the case so that others have access to it.

A technical User Guide with step-by-step tip sheets, including how to manage documents, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Persons, Case Persons & Households

Persons, Case Persons & Relationships

What are "Persons?"

STAAND is a person-based system, meaning every individual with whom CFSA has (or has had) contact has their own "Person Record" in STAAND. The Person Record holds information that is true regardless of how that person is interacting with CFSA, such as their demographic details or health information.

> For example, Joe Smith's birthday is a date certain, no matter if he is the subject of an investigation, or a person on a case. Joe's birthday is therefore held on his Person Record and, while the birthday is visible in many parts of the case, it has to be updated or corrected at the person level.

What are "Case Persons?"

In addition to having a Person Record, every person who is associated with an IH or OOH case (such as children, parents, or someone in the family's network) will also have a "Case Person Record" in STAAND. The Case Person Record holds all the information about the person as it relates to the case of which they are a part. Case Person Record information includes items such as legal statuses, permanency goals, case plans, assessments, contact notes, and court reports.

Doing a Person Search. When creating a new Case Person, you will be prompted to create a linked Person record. This step is critical for ensuring your Case Person is available for all the documents and reports you will develop. It is also the way you make sure that if there are two people with the same name in the system, the correct person is linked to your case.

Click HERE for a tip sheet on creating case persons, persons, and doing a person search.

Roles on a Case

Case Persons (i.e., people who are part of a case) will play a specific role on the case. In STAAND, there are only three roles a Case Person can play: they are either a child on the case; a parent/acting parent*; or someone in the family's network (formerly known as a "Collateral").

> **** About "Parent/Acting Parent."*** STAAND strives to be a gender-neutral system that accounts for same sex parents and does not assume, for example, that the mother is the "primary caregiver." This is why mothers, fathers or caregivers are assigned the neutral case role of "parent/acting parent." An individual parent's sex assigned at birth and their identified gender are available on their Person Record.

Each case person can have only one of these roles on a case. However, someone could be part of more than one case, and have a different role on each. For example, Joe Smith could be a Case Person in the

role of child on one case and a Case Person in the role of parent on another case.

Because a case person can only have the role of Child, Parent/Acting parent, or Family Network on a case, relatives (like grandparents or cousins – who are neither parents nor children on the case) are assigned the role of "Family Network." This may take a little getting used to! The nature of the Family Network relationship is captured as that person's "Title," such as stepparent or friend.

Click HERE for a tip sheet on entering a person in the Family Network

At the General Tab on a Case Person, the IH SW can also identify whether someone in the role of Family Network is a Concurrent Kin Plan (CKP) for a child.

Relationships Between People on a Case

All people in the system have some kind of relationship to each other. These relationships are captured and held at the person level -- because your grandmother is always your grandmother, regardless of the case circumstances.

Relationships are entered during an investigation and carry-over to the case. Social Workers are responsible for "keeping them up" meaning adding the relationship when creating a new case person; or adjusting relationships that came from the Investigation.

Click HERE for a tip sheet that includes instructions on creating relationships in STAAND.

When the People, their Roles, and their Relationships are Complicated…

Some case circumstances make entering people's roles and relationships In STAAND complicated. For example:

- Is the child of a youth in foster care another child on the youth's case or are they a grandchild on that case? When a youth in care becomes a parent are they still a child on their case?

- What if one child's father is putative, their sibling's father is unknown, and another sibling's father is legal? How does a Family Roadmap, Case Plan or Court Report work?

Though it can be confusing, getting people in their proper "places" in STAAND is ***critical*** to creating accurate case documents like Family Roadmaps, Case Plans, Court Reports.

Click HERE for a practice guide on case management and documentation in STAAND with pregnant and parenting youth.

Click HERE for a practice guide on case management and documentation in STAAND with fathers (unknown, legal, putative or father-figures).

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Households

What are Households, and How Do They Work in STAAND?

Households describe the living configurations of the key people on a case – put simply: who is living under which roof. Households support clinical understanding of a family and provide a framework for successful engagement and intervention.

Households are different in STAAND than they were in FACES in two important ways:

1. Households do not determine visitation, case planning or assessment requirements. Social Workers and their supervisors will make clinical determinations about whether and how these case activities will be implemented across multiple households.

2. There are three types of households in STAAND:

    - **Substantiated households.** This type of household must include at least one parent/acting parent who has been substantiated and one child at home (on an In Home Case), or one child who resided in the home prior to separation, but is now in Out of Home care.

    - **Concurrent Kin Plan (CKP) households.** This type of household must include the person in the Family Network who has been identified as the CKP for any child on the In Home case (CKPs are not identified on an Out of Home case).

    - **Related households.** This type of household includes people relevant to the case, but who are neither CKPs nor substantiated parents/acting parents. For example, the household of a non-substantiated parent would be a related household.

How are Households Used in STAAND?

When a case is created from an investigation, the households identified by the investigative team will populate to the case. Over the life of a case, the Social Worker can update or close these households – or create new ones.

A technical User Guide with step-by-step tip sheets, including on how to create and manage households, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Engagement with Children and Families

Visitation Requirements

Among the most important work undertaken by CFSA is clinical contact with children and families, and facilitation of Family Time for parents and their children who are in foster care. The cadence of required visits varies by case type and, for OOH cases, by permanency goal.

In Home Visit Requirements

For In Home cases:

- **Family visits** are required a minimum of twice per month and must include the parent(s) and children on the case. One visit must be conducted by the Social Worker in the home; the second visit can be conducted by the SW, or another CFSA staff member working on the case. Visits may be increased beyond the twice-monthly requirement based on the needs of the child and family.

- **Family Time.** Court-involved In Home cases may require Family Time visits if a child is living with one parent and the other parent has court-ordered visits. These visits support the child's relationship with the non-custodial parent while also helping the adults parent jointly. It would be expected that these visits are unsupervised or designee-supervised, but safety concerns may also have to be managed.

Out of Home Visitation Requirements

For Out of Home cases:

- **Social Worker-child visits**:

    - Social Worker visits with children in foster care are required a minimum of once per month, in the child's placement. However, the expectation is that Social Workers will visit some children much more frequently than that, based on their age, adjustment to foster care, and other clinical needs. Beyond the monthly requirement, the needed visit cadence for all children is determined between SW and SSW.

    - Social Worker visits with children in Protective Supervision are required twice per month.

    - Social Worker visits with the siblings of children in foster care who remain in the care of their parent/acting parent, are required once per month.

- **Family Time Events (formerly "parent-child visits"):**

- The first Family Time Event between parents and children in foster care should take place within 72 hours of separation. ***This is a NEW requirement to support parent-child relationships during a particularly traumatic time.*** Given the timing, this visit is likely to be arranged and supervised by the Investigative team and/or otherwise coordinated during the Separation transfer staffing or FTM.

- On-going Family Time events are held at least weekly thereafter, unless otherwise ordered by the court.

  Family Time events can be supervised by an agency staff member; by an identified designee (e.g., a resource parent, a family member, a facility staff member, a mentor or CASA, etc.); or they can be unsupervised. A court order contains the type of supervision.

  The agency supervises Family Time events in order to assess for safety, parenting capacity and the strength of the parent-child relationship. Progressing from supervised to unsupervised visits is a strong indicator of a family's movement towards reunification.

  NOTE on Family Time and Protective Supervision: OOH cases in Protective Supervision, in which the child is living with one parent and the other parent has court-ordered visits, require Family Time Events. These visits support the child's relationship with the non-custodial parent while also helping the adults parent jointly. It would be expected that these visits are unsupervised or designee-supervised, but safety concerns may also have to be managed.

- **Sibling Visits** between children who are placed separately are required twice per month.

- **Social Worker visits with parents**

  - Social Worker visits with parents or acting parents are required once per month when the permanency goal is reunification.

  - Social Worker visits with pre-adoptive parents or prospective guardians are required once per month when the permanency goal is adoption or guardianship, and a petition or motion has been filed. ***This is a NEW requirement to support continuity and planning with the people who will become a child's forever family.***

NOTE on virtual visits: For both IH and OOH cases, virtual visits can be helpful in supplementing minimum requirements. However, all families deserve frequent in-person time together, as well as with the Social Worker, in order to make progress on their case plans. Virtual visits will therefore be

noted, but cannot be used to meet visitation requirements.

How Do I Track My Visits in STAAND?

The IH and OOH Social Worker dashboards have a section displaying — for the current and previous month — the visits that have been conducted and/or that are pending, in order to meet requirements.

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Documenting Your Engagement Using Contact & Quick Notes

Why is Documenting Your Work with Families Important?

One of the most critical tasks in case management is timely, robust documentation of ***all*** the work undertaken (or attempted) with a family — from visits to case planning, to time spent with a parent or youth securing needed resources.

The Contact Note form in STAAND is available to workers across program areas – not just case carrying Social Workers – so they, too, can document their work on a case. Users select their work area and the type of work they are doing, e.g., IH or OOH visits, placement, subsidy, PEER etc. Supervisory Social Workers and Program Managers with direct client contact must also complete notes.

All staff members working on a case are expected to document their activity in STAAND. Thorough documentation supports excellent planning, builds strong collaboration across teams, ensures a complete record of our work, and helps CFSA meet requirements and benchmarks.

Additional Clinical Detail for Documenting Family Time Events

When documenting a Family Time Event (formerly "parent-child visit") in STAAND, the contact note form requires a clinical assessment about the visit in four key areas:

- Parent/child relationship & family dynamics
- Parenting capacity
- Impact on children
- Parent behavior and communication

A tip sheet to help you complete this type of contact note can be found on the CFSA website HERE.

By When Do Contacts Need to be Documented?

Quick turnaround in documenting contacts is a clinical necessity. The longer you wait between meeting with someone and documenting it, the more likely elements of the encounter may be lost, mis-remembered or inaccurate.

The timeframe for documenting contacts in STAAND is, therefore, the same as it was in FACES: within 24-48 hours of the event. However, because use of mobile phones and tablets is greatly improved in STAAND, it should be much easier to meet this timeframe.

NOTE on timing: The need for quick turnaround (plus an improved system for entering notes) means that final monthly visit reports in STAAND will count visits **only if they have been entered within 72 business hours of the end of the month in which the visit took place** – Social Workers will no longer have until the 15th of the following month to document their visits.

What are Quick Notes?

Quick Notes are a short, simple version of Contact Notes that allow a Social Worker to easily capture activity that is often left undocumented because of workload pressures and the detail required in a Contact Note. For Social Workers, different types of Quick Notes allow easy documentation of:

- **Unsupervised or designee-supervised family time events** (formerly called parent-child visits)
  - ✓ Only the date, participants, length of visit, location and information source are required.
  - ✓ This Quick Note counts towards visit requirements if the parent and a child are entered as participants.

- **Family engagement efforts**
  - ✓ Quickly capture efforts to engage a family by entering the date, how and where you tried to reach them, and selecting an outcome.

- **Other case management activity**
  - ✓ Easily document critical tasks (such as dropping off a food card for a family) or important email, phone or text exchanges with a parent or youth, without having to complete a full Contact Note.

Work by SSWs and PMs can also be documented via a Quick Note.

Where do I find Contact and Quick Notes in STAAND?

The Contact Notes Tab on a case holds a list of all Contact and Quick Notes created over time, by any staff member interacting with a family. It's also where you create a new Contact or Quick Note.

When completing a contact note, staff can elect to use the "PCAP" format, with dedicated text boxes for the Purpose, Content, Assessment and Plan. Contact notes that have in-depth clinical content are well-suited to the PCAP format.

A technical User Guide with step-by-step tip sheets, including on how to enter contact and quick notes, can is on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

Click HERE for a tip sheet describing the different uses for contact notes and quick notes

Coming soon! Tips on how to use CORA AI to help you complete your contact notes.

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The Family Engagement Tab

What is the Family Engagement Tab?

Having dependable support is a key to stability and well-being for ***all*** families. Knowing this, one of CFSA's top objectives is to find as many relatives – and members of a family's extended network – as possible and engage them as active participants in a case. For children in Out of Home care, we also hope these kin and fictive kin will become placement providers if possible and/or resources for permanency should that be needed.

With these objectives in mind, many CFSA teams actively work to engage families. The Family Engagement Tab on a case provides for a common understanding of activity and progress in this area. It's also a location in which support teams (PEERs, FTM or Kin licensing) can document their work.

The Family Engagement tab includes:

- **Family Roadmaps** that are produced during Family Team Meetings (FTMs). New FTM Roadmaps can be started from this location, and the full set of Roadmaps produced on a case is available at the Plans tab.

- **FTM coordination Quick Notes** that have been entered. New FTM coordination Quick Notes can be started from this location, or at the Contact Notes tab on the case.

- **Kin licensing information** including Contact or Quick notes in this area and a summary of placement requests on the case, and their kinship status (e.g., kin identified, kinship pending, or kinship unknown).

- **Diligent Search.** A list of all the Diligent Search requests that have been made on the case. By clicking into each one, you can see the results. This is also the location in STAAND where you make a new Diligent Search Request.

- **PEER orientation and activity.** The date of a PEER's 1:1 orientation with parents displays here, as well as any contact notes entered by the PEER team for general parent engagement work or service connection and support. PEER contact notes can also be entered from this location.

- **Parenting support services**. A list of services in this category that have been requested or provided to a parent/acting parent or member of the Family Network.

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Diligent Searches

What is a Diligent Search?

When a child has been (or might be) separated from family, the early involvement of non-custodial parents, relatives and significant non-relatives is critical to providing the family with support, as well as for exploring placement and/or permanency resources for the child.

A "Diligent Search" is electronic database research, conducted by the CFSA Diligent Search Unit (DSU), aimed at surfacing individuals who may be connected to the family but are unknown to the Agency. While a Diligent Search is always conducted upon (or immediately preceding) a separation, it may be conducted, as needed, at any juncture (though not within 30 days of the last one).

The Social Worker and/or other case team members (e.g., Kinship Unit staff) follow-up on any information found through the Diligent Search. To supplement formal Diligent Searches, Social Workers should be routinely seeking-out and exploring a child's kin and fictive kin, and documenting their efforts in Contact Notes.

How Do I Request a Diligent Search in STAAND and See the Results?

Prior to STAAND, Diligent Search requests were made through a QuickBase application. In STAAND, they are made (and viewed) at the Family Engagement Tab on case.

A technical User Guide with step-by-step tip sheets, including on how to refer for a Diligent Search and view the results, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Plans

The Family Roadmap

What is a Family Roadmap?

The Family Roadmap is a simple, family-friendly planning document detailing a family's strengths and challenges; the overarching objectives for their involvement with CFSA; action steps to be taken; and how they are progressing. It is also the place to specify plans for how extended family, and people in a family's network, will be involved in supporting them.

Updated versions of the Family Roadmap follow a family throughout their time working with CFSA. The version of the Roadmap created during an At-Risk or Separation FTM, for example, is reviewed and updated by the Social Worker to accompany Case Plans. Updates are done using the "cloning" function (click HERE for more information). Updating the same Family Roadmap over time provides continuity for the family and creates a real record of their progress.

The Family Roadmap is based on (and replaces) the FTM Plan template.

When and How Do I Use a Family Roadmap?

In STAAND, in addition to documenting FTMs, the Family Roadmap serves as a signed summary of the Case Plan. These two documents are automatically transmitted to the court together. This is required throughout an IH case, and until a child in Out of Home care's goal changes to Adoption, Guardianship or APPLA. After that, a Family Roadmap can be used as needed, depending on the parents' continued involvement in the case.

As a Social Worker is building and updating the Case Plan, they will also complete the Family Roadmap ***with*** the family (including gathering their electronic signatures), and provide it to them in person, by text or email. If a family declines to participate in creating a Family Roadmap, this is indicated in their Case Plan.

Supervisor review of a Family Roadmap. No Supervisor approval of a Family Roadmap is required to finalize it. This is intentional: the family is the "approver" of a Roadmap, since it is a collaborative planning document. However, Supervisors are still required to review the Family Roadmap alongside a Case Plan they are approving to make sure the goals, objectives and action steps are aligned and that both documents are complete.

The Family Roadmap is the new Mediation Report template. With or without family participation, in STAAND a Family Roadmap is also used as the "Mediation Report" on a new OOH case. The Social Worker can create a new Roadmap for this purpose, or "clone" a previous version, and adjust the content as needed. *Using the Roadmap for Mediation does require Supervisory approval*, after which it is automatically transmitted to Multi-Door.

How Do I Complete a Family Roadmap in STAAND?

The Plans Tab on a case holds a list of all the Family Roadmaps that have been created over time, and is the place to create a new Family Roadmap or update an existing one.

A technical User Guide with step-by-step tip sheets, including on how to create or update a family Roadmap, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

You can also get detailed instructions on completing a Family Roadmap from within STAAND in the "Steps" area of CORA, the system's AI assistant. Click HERE for a tip sheet on using CORA

Finally, Click HERE for a practice guide on case management and documentation in STAAND with fathers (unknown, legal, putative or father-figures) – including specific instructions on Family Roadmaps.

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Case Plans

How are Case Plans Different in STAAND?

In preparation for the transition to STAAND, the complexity and "un-family-friendly" nature of CFSA's Case Plans was explored. STAAND Case Plans have these improvements:

- There are different templates for In-Home and Out-of-Home Case Plans.
- There is only ***one*** Out-of-Home case plan template, used for all family structures and permanency goals.
- The Service Plan lives ***within*** the case plan and not in a separate document.
- The timing is different: the initial Case Plan is due 45 days from separation or opening of an In Home case, and then every four months after that.
- Adding or removing people on a Case Plan does not invalidate any previous plans. Rather, it allows the Social Worker to accurately list who is involved in the Case Plan at any given time.

What information is needed to complete a Case Plan in STAAND?

OOH case plans require the following content:

- Case objectives for parents and children (click here for more information about using case objectives in STAAND)
- A "Strengths & Supports" summary
- A "Case Challenges" summary
- A services summary
- Updated Family Time Plans and, for each, visit quality ratings (click here for more information about Family Time Plans)
- A Family Time summary
- Child well-being information:
  - Placement stability rating and summary (click here for more information about using progress ratings in STAAND)
  - Progress towards adoption or guardianship (if relevant)
  - Education details (academic progress, attendance, school behavior, parent participation) and summary
  - A "Physical and Behavioral Health" summary
  - As age-appropriate, "Transition to Adulthood" summaries (strengths, challenges, barriers, next steps)

- A "Case Progress" summary
- Narrative on the family's engagement in case planning

In Home case plans require the same content with these exceptions:

- No case objectives for children
- No Family Time information (in most circumstances)
- No placement content
- No adoption/guardianship content
- No transition to adulthood content

Getting help on Case Plan narratives: In FACES, "help text" on the content for some case plan narratives was available by clicking a question mark. In STAAND, this help is available with a query to CORA (the system's Case Management AI assistant). For example, in the "Helper" area of CORA, if you enter "Summary of Case Progress" the system will return this response:

> *Describe the family's progress toward achieving the permanency goal (OOH case) or case closure (IH case). Include detail on kin engagement if relevant. Use concrete examples, such as: "The parents have been participating in all ordered services, attending most scheduled visits and demonstrating improved parenting skills, such as using appropriate discipline. The maternal grandmother and aunt have been supportive of their efforts, participating in family visits monthly." List or summarize the remaining steps or activities required for case closure, such as the period of time during which the parent must have negative drug tests; or an assessment and recommendation from the family therapist.*

Click HERE for a tip sheet on using CORA.

A narrative short cut for Social Workers! Some of the narratives required in a Case Plan are also required in Court Reports, in Youth Transition Plans, or in other case documents. In FACES, Social Workers had to "cut and paste" this information from one document into another, or from an earlier version of a document to the current version.

In STAAND, this cutting and pasting is no longer necessary: the system carries forward a Social Worker's most recent content, so that it can be reviewed and updated as needed, and then carried forward again to the next document that requires it. Click here for more information about these "shared narratives."

Signatures on case plans (and Family Roadmaps):

- ✓ **All youth** over the age of 14 who are in foster care are required to sign their Case Plans. This is good practice for IH cases, but not federally required. Any youth who participates in an FTM or Family Roadmap conversation *should* sign that document.

- ✓ **Any parent who is engaging in case management** (on IH cases or OOH reunification cases) is required to sign their Family Roadmap ***AND*** their case plan.

- ✓ **If parents are *not* engaging in case management** (on IH cases or OOH reunification cases), a Family Roadmap will not be created -- since it is a collaborative document with the family. Instead, on the Case Plan, at the Summary Tab, the SW indicates that the Family Roadmap was not completed and why. Because signatures are not possible from non-participating parents, they aren't included on the case plan, and STAAND Case Plan PDFs do not display empty signature lines.

- ✓ **Case plans for children and youth with goals of APPLA, Adoption and Guardianship.** On OOH cases with these goals, parental signatures are not required on the case plan. Generally, Family Roadmaps are not created on these cases.

How to get signatures: On both the Family Roadmap and the Case Plan, there is a Signatures or Acknowledgements Tab at which youth (14+) and parental signatures are gathered. On a Roadmap, this is where the SW and other professional participants can add their signatures.

Any parent or youth who signs -- or actively declines to sign -- a Family Roadmap or Case Plan will display in a participant signature box on the PDF.

If someone is participating virtually, they can designate a person to sign for them. Information about who is designated and why must be completed.

How Do I Complete a Case Plan in STAAND?

The Plans Tab on a case holds a list of all the Case Plans that have been created over time, and is the place to create a new Case Plan or update an existing one.

A technical User Guide with step-by-step tip sheets, including on how to complete a Case Plan, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

You can also get detailed instructions on completing a Case Plan from within STAAND in the "Steps" area of CORA, the system's AI assistant. Click HERE for a tip sheet on using CORA

Finally, Click HERE for a practice guide on case management and documentation in STAAND with fathers (unknown, legal, putative or father-figures) – including specific instructions on Case Plans.

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Support & Safety Plans

What are Support Plans and Who uses them?

Support Plans are formal, written documents created with a parent/acting parent. They identify immediate safety threats and the plans to address them so a child can remain safe in the home with their family.

- The Investigative team can create four different types of Support Plan: a Plan of Safe Care (aka an Intervention Plan); a Personalized Domestic Violence Intervention Plan; an Informal Family Planning Arrangement (IFPA); or a Safety Plan.

- The only type of Support Plan used by IH and OOH Social Workers is the Safety Plan. Safety Plans are created on a case as needed, depending on a clinical assessment of the family's circumstances.

What's in a Safety Plan?

Safety plans list specific concerns, the actions that will be taken in response, who is responsible for taking these actions, under what conditions, and when they should be completed or achieved.

Every participant in the Safety Plan must understand and agree to their roles and responsibilities and sign the plan in acknowledgement. Safety Plans typically last no more than 30 days and should be monitored by the Social Worker weekly. Then:

  - If the Safety Plan will continue, the Social Worker uses a "timeline" feature on the Safety Plan to document their updates.

  - If the Safety Plan has been achieved, the Social Worker end dates it and indicates how the concerns have been addressed.

  - If the Safety Plan has failed to achieve its objectives, a separation may be the next step.

Major changes to a Safety Plan (e.g., adding a danger indicator or changing the people involved) generally require ending the current plan and creating a new one, or "cloning" the active plan, changing the date and updating it. Click HERE for detail about cloning in STAAND.

How are STAAND Safety Plans Different?

- Safety Plans in STAAND are substantially more visible than they were in FACES: all team members can see them and track their progress on the Timeline. In addition, a Supervisor's dashboard will show whether Social Workers are actively engaging with the Safety Plan.

- Safety Plans can be created and used without linkage to the Danger & Safety Assessment. In STAAND, this assessment is only completed during an investigation.

- Safety Plans can be created on mobile devices and signed electronically by family members and other participants.

- Once a Safety Plan is completed, the Social Worker is required to refer the family for an At Risk FTM (or conduct a family meeting themselves if, for example, an At Risk FTM was recently held). An At Risk FTM is particularly critical if the Safety Plan involves the potential for children to live with kin, so that the kinship team can become involved.

  Upon finalization of the Safety Plan, the Social Worker will see a task on their dashboard to refer for an At Risk FTM. If the intervention is a SW-led family meeting, this is documented in a contact note, adding the title "Safety Planning."

Where do I find Safety Plans?

Safety Plan can be viewed or created at the Plans tab on a case.

A technical User Guide with step-by-step tip sheets, including on how to create and manage a Safety Plan, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Family Time Plans

What is a Family Time Plan?

In STAAND, a "Parent-Child Visit" is called a "Family Time Event" – it is the time a parent and their children spend together. What were called "Visitation Plans" in FACES are now called "Family Time Plans" in STAAND.

A single family might have multiple Family Time Plans. For example: if there is a large sibling group with different parent configurations, one parent might spend time with child A; a different parent might spend time with child B; and both parents might spend time with children C, D and E. In this case, there would be three separate Family Time plans for that family.

Each Family Time Plan captures who is part of a particular grouping, as well as the parameters around the group's time together, such as the frequency of the visits, the type of supervision, the duration, and any court-ordered specifications.

Court-involved In Home cases may require a Family Time Plan and visits if a child was separated then conditionally released to one parent and the other parent has court-ordered visits.

How do I Create or Update a Family Time Plan?

The Plans Tab holds all the Family Time Plans on a case, and is a place to create a new Family Time Plan, or update an existing one (e.g., by changing the people involved or any of the visit parameters).

If a family requires multiple Family Time Plans involving similar groups of people, the Social Worker can make a "clone" of one Plan and adjust details as needed. Click HERE for more information about cloning in STAAND.

The most current version of a Family Time Plan is populated to Family Roadmaps, Case Plans and Court reports. A new Family Time Plan (or adjustments to an existing plan) can therefore be added from within any of these plans or reports, and the revisions will populate across all of them.

A technical User Guide with step-by-step tip sheets, including on how to create and update Family Time Plans, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Youth Transition Plans (YTPs)

What is a Youth Transition Plan and Who Needs One?

Youth Transition Plans – and the multi-disciplinary team meetings that are used to complete them – provide an opportunity for CFSA and a youth's support network to regularly plan with an older youth in foster care about their transition to adulthood.

Youth Transition Plan Meetings begin when a youth turns 16 and are held every six months until they turn 20. After that, a YTP Meeting is held every three months until the youth exits foster care. In STAAND, when a youth is "due" for a YTP meeting, the system will automatically create a task for the Social Worker.

What is Discussed and Documented in a YTP Meeting?

The youth must be present at a YTP Meeting. If the team convenes but the youth does not participate, the Social Worker can enter a contact note to document the conversation.

In addition to the youth and the assigned Social Worker, other participants often include: the GAL; the Resource Parent or other placement provider; service providers such as a therapist; and the youth's lifelong connections.

The YTP Meeting focuses on 1-3 planning domains that are of greatest interest to the youth, such as Job and Career, Life Skills, Education or Housing. In each domain, the group discusses:

- How the youth is progressing
- What action steps the youth (or others) will take, in what timeframes, and with what support
- What formal services will be needed

How do YTPs, Housing Plans and Case Plans Relate to Each Other?

Social Workers supporting older youth in foster care are responsible for completing a series of different planning documents, each with its own focus and timeframes:

- **Case Plans and Family Roadmaps** are completed every four months and focus on the big picture for a family and/or youth, such as case goals and permanency plans.

- **Youth Transition Plans** are completed every six months and focus on supporting youth to achieve specific adult competencies.

- **Housing Planning for youth who will not exit to positive permanency** begins when youth turn

20 and focuses on ensuring a youth is properly housed when they leave foster care.

There is repetition across these three plan types. However, planning meetings can be combined (e.g., a housing meeting and a YTP can be conducted together) and STAAND will keep track of the timing and due dates for each, posting them to the Social Worker's dashboard.

In addition, STAAND takes the Social Worker's most current narrative content (e.g., a summary of a youth's challenges) from one plan, and brings it into the next plan that is due. When the narrative is edited, the updated version carries forward to whatever document requires it next. There is no more cutting and pasting between YTPs or from Case Plans to YTPs and back again!

Finally, a Social Worker can "clone" a previous version of the YTP to capture all earlier content and update it accordingly. Click HERE for more information about cloning in STAAND.

Where do I find Youth Transition Plans in STAAND?

The Plans Tab on a case holds a list of all Youth Transition Plans that have been created over time, and is the place to create a new Youth Transition Plan or update an existing one.

A technical User Guide with step-by-step tip sheets, including on how to create and update Youth Transition Plans, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

You can also get detailed instructions on completing a Youth Transition Plan from within STAAND in the "Steps" area of CORA, the system's AI assistant. Click HERE for a tip sheet on using CORA

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Housing Plans

What is a Housing Plan and Who Needs One?

Following the passage of new legislation in March 2023[1], all youth who exit foster care after their 16th birthday must have a written Housing Plan. There are two types of Housing Plans:

- **Housing Plans for youth who are exiting to positive permanency.** For youth age 16 and older who are exiting to Reunification, Adoption, Guardianship or Legal Custody, within seven days of case closure the Social Worker must complete a very simple Housing Plan to be stored on the youth's case person record in STAAND.

- **Housing Plans for youth who are aging-out of foster care (@ 18 or older), or exiting to APPLA.** The Housing Plan for youth aging-out of foster care or exiting to APPLA is critical: it seeks to ensure they do not fall into homelessness. This Housing Plan details the youth's housing goals, the resources that may be available to them (e.g., a housing voucher) and the specific plans for helping them achieve their plan.

  For youth who plan to age-out of foster care prior to age 21, the Social Worker can begin working on their housing plan at any time. For youth exiting to APPLA at age 21, at a minimum, an initial Housing Plan is created when they turn 20; is updated when they are 90 days from turning 21; and updated again upon exit from foster care. Housing Plans can be initiated and/or worked on during Youth Transition Plan (YTP) meetings.

In STAAND, when a youth is "due" for a Housing Plan, the system will automatically create a task for the Social Worker.

Housing Plans should build from each other over time, understanding that a youth's objectives and housing strategies are likely to evolve. With this in mind, when the next Housing Plan is due, the Social Worker will simply open the current (active) plan, change the date, make adjustments and save it.

At the time a youth is exiting foster care to positive permanency, or is aging-out or exiting to APPLA, their Housing Plan must be finalized. The Social Worker presses the "Complete" button in the ribbon, and then changes the plan's status to final.

Where do I find Housing Plans in STAAND?

[1] Preserving Our Kids' Equity Through Trusts (POKETT) and Fostering Stable Housing Opportunities Amendment Act of 2022 (DC Law 24-309, effective March 10, 2023

The Plans Tab on a case holds a list of all Housing Plans that have been created over time, and is the place to create a new Housing Plan or clone and update an existing one.

A technical User Guide with step-by-step tip sheets, including on how to create and update Housing Plans, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

You can also get detailed instructions on completing a Housing Plan from within STAAND in the "Steps" area of CORA, the system's AI assistant. Click HERE for a tip sheet on using CORA

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Using Case Objectives to Plan with a Family

What are Case Objectives?

As part of clinical work, Social Workers should always be talking with families about the objectives for their involvement with CFSA. And, once these are established, the Social Worker and family can drill down to the specific action steps needed to achieve success.

STAAND makes this process explicit. When creating Family Roadmaps and Case Plans, Social Workers will enter case objectives for parents (and for children if they are in foster care). CFSA has identified six overarching case objectives for this purpose:

1. **Improve coping skills.** Manage trauma and triggers and express emotions constructively so they don't negatively impact children's safety and well-being.

2. **Improve parenting behavior and routines.** Increase understanding of child development and effective parenting, and secure needed resources and supports.

3. **Eliminate relationship violence.** Eliminate relationship violence and/or establish boundaries that create safety for all family members.

4. **Address mental/physical health.** Address mental and physical health concerns so they don't negatively impact children's safety and well-being.

5. **Manage developmental/cognitive concerns.** Secure resources and supports needed so developmental/cognitive abilities don't negatively impact children's safety and well-being.

6. **Address substance use.** Address substance use (through treatment, abstinence or reduction) so there is no negative impact on children's safety and well-being.

The Social Worker can select as many objectives as apply for each parent. If none applies (e.g. if a family member is unable to participate due to incarceration), "Other" can be selected and detail added.

For Out-of-Home cases, CFSA has also identified overarching objectives for children and youth in foster care. These are:

1. Timely adoption
2. Timely guardianship
3. Timely legal custody
4. Timely reunification
5. Successful transition to adulthood

6. Finance & Money Management
7. Job & Career
8. Life Skills
9. Identity
10. Education
11. Self care & health
12. Housing
13. Parenting Skills

Note that objectives 6-13 align with the domains used in a Youth Transition Plan, however in the context of a Case Plan, they may be interpreted differently. For example: in a YTP, the domain "identity" is generally used to describe the youth's need for a birth certificate, Social Security Number or other identifying documents. In a Case Plan, acquiring documents would not likely be considered a high-level case objective. Rather, "identity" as a case objective would more likely be about supporting a youth to resolve issues of identity or sense of self.

How Do Case Objectives Work in STAAND?

Case Objectives are entered (or updated) in a Family Roadmap or Case Plan. The most current objectives selected by the Social Worker travel between these two documents. So, if objectives are selected for a Family Roadmap, they automatically populate to the Case Plan and vice-versa. They can be updated in either location.

A technical User Guide with step-by-step tip sheets, including on how to enter case objectives in a Case Plan or Family Roadmap, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Using Progress Ratings to Plan with a Family

What are Progress Ratings?

While completing a Case Plan or Court Report, Social Workers will be asked to evaluate family members' progress in three areas:

1. **Services:** their participation, the impact the service is having on them, and any plans for adjustment.

2. **Placement Stability (OOH only):** how a child or youth is adjusting to their current placement.

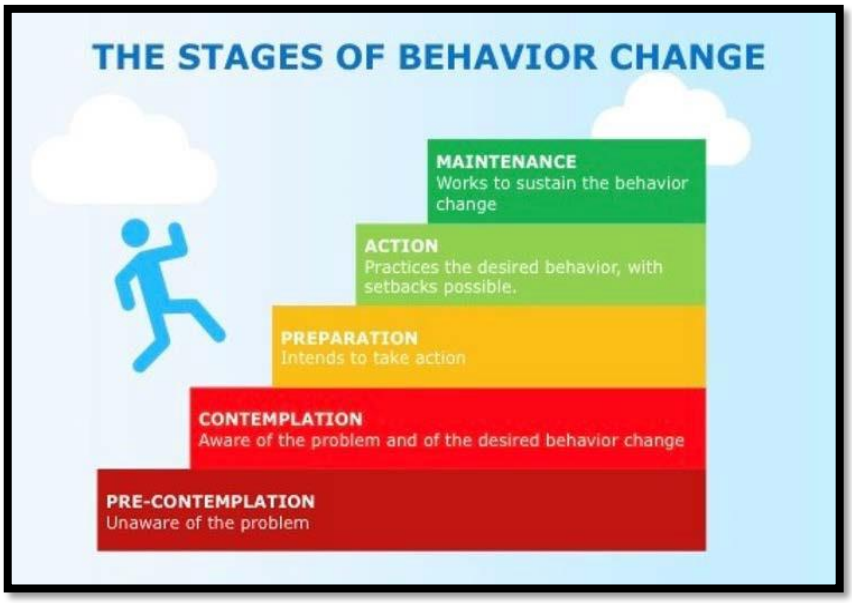
3. **Education:** progress on a child or youth's academics, including their attendance, behavior, and parental participation in their education.

The STAAND rating scales in these areas should be intuitive for Social Workers. For example:

- For Placement Stability, the options are: Very stable, Mostly stable, Unstable, Child/Youth is Missing/Absent/Abducted, or Other (enter detail).

- For services participation, the options are: Always, Frequently, Occasionally, Rarely, Never or Other (enter detail).

However, the rating scale for service impact may be less well-understood. It moves from "Pre-Contemplation" to "Maintenance," and here are the definitions for each stage:



How Do Progress Ratings Work in STAAND?

A parent or child's progress is updated whenever a Case Plan or Court Report is being created or updated. The most current ratings that have been selected by the Social Worker travel between these documents. For example:

> In a Court Report, the Social Worker indicates that a parent is participating in a service (e.g., a parenting class) "frequently.
>
> When the Social Worker is completing the next Case Plan, "Frequently" will appear as the service participation rating. The Social Worker can either leave this rating or change it based on the parent's current participation.
>
> The retained or updated rating will appear the next time the Social Worker completes a Court Report or Case Plan, where it can be further updated as needed.

A technical User Guide with step-by-step tip sheets, including on how to enter progress ratings in Case Plans and Court Reports, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Assessments

FAST Assessments

What is the FAST Assessment?

The Family Advocacy and Support Tool (FAST) is CFSA's new child and family assessment tool. For Case Management teams, the FAST will replace the Caregivers Strengths and Barriers Assessment (CSBA) and the CAFAS/PECFAS.

As a strengths-based approach, the FAST supports the belief that families have unique talents, skills, and life events, in addition to specific unmet needs. Failure to demonstrate an individual skill should first be viewed as an opportunity to learn the skill as opposed to a problem. Focusing on the family's strengths instead of weaknesses may result in enhanced motivation and improved performance.

The FAST Assessment brings together three components:

- A family assessment
- A caregiver assessment
- A child assessment (one tool for children 0-5 and another for those 6-21)

When Do I Complete FAST Assessments?

A FAST assessment must be completed for all the children and caregivers on a case, as well as for the family as a whole, each time you are completing or updating your Family Roadmap and Case Plan. For cases in which not all members of the family remain involved, the requirements are different. For example, if a child on an Out of Home case has a goal of adoption and the parents are no longer participating in case planning:

- There would no longer be a Family Roadmap
- The Case Plan would not include the parents as participants, but might include the petitioner as a participant.
- The only FAST assessment component to be completed would be for the child.

While the FAST does not require supervisory approval, it is the expectation that supervisors review the FAST, the Case Plan and Family Roadmap together to ensure alignment.

Integrating Your FAST Ratings into Case Plans and Family Roadmaps

Through your FAST Assessment, you will identify family strengths and needs which should be evident in your Case Plan and Family Roadmap, and all aligned with your case objectives. The FAST brings a level of objectivity that complements your clinical assessments. Following are examples of how case objectives and FAST core items can be aligned.

Case Objectives and the Aligned FAST Core Items	
Case Objectives	**FAST Core Items**
Improve Coping Skills	**Family Assessment:** • Resourcefulness • Communication • Community Connections • Self-Advocacy **Caregiver Assessment:** • Knowledge • Emotional Responsiveness • Organization • Resourcefulness • Spiritual/Religious • Social Resources for Family **Child Assessment:** • Behavioral/Emotional Needs
Improve Parenting Behavior & Routines	**Family Assessment:** • Family Conflict • Family Role Appropriateness • Family Safety • Parental/Caregiver Collaboration • Knowledge of Faily-Child Needs • Knowledge of Service Options • Knowledge of Rights & Responsibilities **Caregiver Assessment:** • Involvement in Caregiving • Emotional Responsiveness
Eliminate Relationship Violence	**Caregiver Assessment:** • Parental/Caregiver Collaboration • Family Violence **Child Assessment:** • Intimate Relationships
Address Mental/Physical Health	**Caregiver Assessment:** • Medical/Physical • Mental Health **Child Assessment:** • Medical/Physical • Sleep • Behavioral/Emotional Needs

Case Objectives and the Aligned FAST Core Items	
Case Objectives	**FAST Core Items**
Manage Developmental/Cognitive Concerns	**Family Assessment:** • Knowledge of Service Options • Knowledge of Rights & Responsibilities **Caregiver Assessment:** • Developmental **Child Assessment:** • Developmental/Intellectual
Address Substance Use	**Caregiver Assessment:** • Substance Use **Child Assessment:** • Risk Behaviors

How are FAST Assessments Documented in STAAND?

After the new year, FAST will be integrated into STAAND and you will be able to access the tool from the Ribbon (as with Service Hub access) and your results will be accessible on your case.

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Psychosocial Summaries

What are Psychosocial Summaries and Why are They Important?

A Psychosocial Summary Assessment paints a detailed, clinical picture of a person:

- **For parents working with CFSA,** the summary reviews employment, physical and behavioral health history; family of origin dynamics and current network; current living situation; parenting capacity; and interaction with CFSA.

- **For children and youth in CFSA's care,** the summary reviews their developmental history and current medical needs; functioning at home, in school and in the community; personality and temperament; and their history of out-of-home placement.

Completing Psychosocial Summary Assessments supports thoughtful case planning and service referral, and can be used in key case management documents, like court reports. In addition, Psychosocial Summaries are required for making referrals to the Department of Behavioral Health if mental health or substance abuse assessments are court-ordered or otherwise needed.

Social Workers are therefore asked to complete initial Psychosocial Summaries on the parents with whom they are working ***within the first 45 days of a new case***. Psychosocial Summaries for children on the case are encouraged! Social Workers will see this as a task on their dashboard.

How Do I Complete a Psychosocial Summary?

The Psychosocial Summary form can be found on the Assessments tab on a case.

In STAAND, narratives that are part of the psychosocial Summary (e.g., on family of origin, or a family's living situation) will automatically populate to the court reports that require them. In those reports, the narratives can be edited, and the edited version carries back to the Psychosocial Summary to keep it up-to-date. No more cutting and pasting across documents!

A technical User Guide with step-by-step tip sheets, including on how to complete a Psychsocial Summary, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Services & Supports

Requesting and Monitoring Service & Support Resources

How Do Services Work in STAAND?

In STAAND, to refer a family or child for a service, the Social Worker navigates to a case or person record and clicks the "+ create service request" button on the ribbon. This launches an external "Service Hub" in QuickBase.

Within the Service Hub, the SW will identify the participants who are needing the service, and select the broad category of service or support resource needed.

The Service Hub directly links the requestor with many different types of services, such as:

- **Direct Services.** This includes nursing, FTM, FSW, mental health, childcare, substance abuse, transportation, and older youth supports by OYE, among others.
- **Collaborative Services.** This includes Case Transfers and Case Teaming
- **Mental Health Services.** This includes internal OWB mental health services.

What happens next?

Once the SW has selected a service and submitted a referral, they *do not* have to return to the QuickBase. Services requested, underway or completed will be visible on the case in STAAND where they can be tracked by the full team working on a case.

Service providers can make updates on the service in QuickBase, and their updates will be visible in STAAND.

If a requested service requires an approval (e.g., a gift card or birth certificate application) or an assignment (e.g., for an FSW or FTM coordinator), the person who needs to take action on the approval or assignment will automatically receive an email notification letting them know, and they will take the needed action in QuickBase.

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Court-Related Information

Legal Information on a Case

What legal information on my case is available in STAAND?

The Legal Tab on a case holds a wide variety of information:

- Some information is auto-populated from the court (e.g., hearing dates).
- Some information is automatically brought over from other areas of STAAND (e.g. the assigned AAG).
- Some information must be manually entered by the SW (e.g., the name of the judge, GAL and other attorneys on the case).

The Legal Tab is organized into these sections:

Legal Assignments and Contacts:

- Assigned judge
- Assistant Attorney General (AAG, the agency's lawyer)
- Guardian Ad Litem (GAL, the child's lawyer)
- Attorneys for parents, adoption petitioners and guardianship movants, as well as education attorneys.

Hearings and Trials:

- Type of hearing or trial
- Name of Judge
- Date and time
- Courtroom number (or Webex link)
- Involved children.

Court Reports:

Court reports, completed or in progress, will be listed here, except for those on a child's adoption or guardianship case, which are accessed from the Legal Tab on that related case. This is also where Social Workers go to start a new court report.

Click HERE for detail on court reports.

Complaints:

All complaints filed on a case will be listed here. This is also where Social Workers will go to start a new complaint. Click HERE for detail on complaints.

Orders, Motions & Filings:

- Name of the order, motion or filing (with a link to the document)
- Date of the document

OOH Permanency Goals:

For all of the children on an OOH case, the current permanency goal, as well as the date established, is visible on the Legal Tab. On each child's individual Case Person record, the full history of their individual permanency goals can be found at the General Tab.

Following a separation, but before a child has a court-ordered permanency goal, STAAND will auto-populate the permanency goal field with "Pending Court Disposition." Then, Case SWs are responsible for updating this information as follows:

- Change the permanency goal to an agency-recommended goal (usually reunification) by the time of the first case plan (@ 45 days from separation).

- Until the first permanency hearing (at about one year in foster care), enter a concurrent goal (either agency-recommended or court-ordered).

- Update the permanency goal based on whatever is ordered by the court.

Click HERE for a tip sheet on updating permanency goals.

Legal Status:

For all of the children on a case, the legal status, as well as the date established, is displayed on the Legal Tab. On each child's individual Case Person record, the full history of their legal statuses can be found at the General Tab.

Legal Statuses, which are always ordered by the court, are as follows:

- **In Home legal statuses:**

    - Conditional Release. A child remains at home under court supervision. The CFSA IH team manages the work. At any point, the court can revoke this status, resulting in a separation and change of case type to OOH. If the child remains in the home, the status converts to Protective Supervision at the Disposition Hearing.

    - Protective Supervision. After the Disposition Hearing, a child remains at home under court supervision (managed by the IH team) until CFSA requests, and the court agrees, that the oversight is no longer needed, and the case closes, or that the child should be separated, changing the case type to OOH.

- **Out of Home legal statuses:**

    - Shelter care. A child is legally separated from their family, becomes a Ward of the District of Columbia and CFSA has jurisdiction to provide Out of Home services, such as placement

- Upon an emergency separation, the legal status in STAAND auto-populates to "Pre-court custody." When Shelter Care is ordered by the court, the SW needs to update the legal status to "Shelter Care."

- For a non-emergency separations, the legal status of Shelter Care will be ordered by the court at the initial hearing and the SW needs to update the legal status to "Shelter Care."

A legal status of Shelter Care is used until the Disposition Hearing, at which time the court either commits the child or returns them home under Protective Supervision (see below).

- Commitment. After the Disposition Hearing, a child remains separated from their family, a Ward of the District of Columbia, and under case management by an OOH team.

- Protective Supervision. A child exits foster care to reunification, returning to family. The court case is still open, but the child is no longer a Ward.

  The expected period of Protection Supervision on an OOH case is approximately three months. However, a child remains in Protective Supervision status until CFSA requests, and the court agrees, that the oversight is no longer needed, and the court orders closure of the case. The court may also revoke Protective Supervision at any point, which returns the legal status to Commitment.

Case SWs are responsible for keeping legal status up-to-date. Click HERE for a tip sheet on how to do this.

Legal Actions Freeing a Child:

For OOH cases, this is the location in STAAND to document how a child came to be free for adoption or guardianship, such as by parental consent, a judge waiving consent, Termination of Parental Rights (TPR), or voluntary relinquishment.

Court Case Numbers:

OOH and Court-involved IH cases have "court case numbers" that are different from the case number that is assigned to them in STAAND. The court case numbers are:

- **Neglect Number:** This is the primary case identifier in the court system. The neglect number changes with every new case episode.

- **Social File Number** (also called a Juvenile Social File Number, or JSF): This number identifies a court file that contains all of the clinical documents, such as court reports, case plans, etc. This number does not change as long as the child is a minor.

- **XRef number** ("cross-reference" identification) is a unique personal identifier that follows an individual across any cases of which they are a part. This number never changes.

For cases opened after the launch of STAAND, these numbers should be auto-populating from the court. Otherwise, they can be found in the Initial Hearing Order and entered on the Legal Tab in this section.

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Court Reports

Improvements to Court Reports in STAAND

In STAAND, Social Workers will be able to complete *all* of their required court reports – including, for OOH Social Workers, Adoption and Guardianship reports.

Completing court reports will no longer involve "cutting and pasting" from Case Plans and other work products. Narratives that appear in more than one work product will "travel" between them so that the most up to date version of the narrative is always displayed.

> For example, when a Social Worker begins a court report, the most recent version of narratives they have previously written (e.g., in their last court report, or in a more recently completed Case Plan) will appear in the court report, where they can be edited and updated. Then, the edited version of the narrative automatically carries forward to whatever work product requires it next.

In STAAND, the Family Roadmap will be submitted for a Mediation Report, so a separate Mediation Report will not have to be written. Click HERE for information about the Family Roadmap.

How Do I Know When My Report is Due?

Court report due dates are automatically populated to a SW's dashboard and Case tasks based on the date of the next hearing, the amount of time in advance of that hearing the Court requires the report to be submitted, and the time it takes for the report to go through its internal review and approval process.

> *For example: if a Permanency Hearing is scheduled for March 15, the Permanency Hearing Report must be approved and transmitted to court by 10 business days before that. It must therefore be submitted by the SW to the SSW two weeks before it is due to court.*

Court hearing dates come to STAAND automatically from the court. The exception is Adoption and Guardianship trial dates, which must be manually entered in STAAND in the "Hearings" grid at the Legal Tab on a case, in order for the report due date to pull to a dashboard or task list.

Note: if a non-Adoption or non-Guardianship hearing date ***does not*** come over automatically from the court, the SW should enter it in the Hearings section at the legal tab. That way a "report due" task will be generated.

How Do I Complete a Court Report in STAAND?

The Legal Tab on a case holds a list of all the court reports that have been started or completed on that case, and is the place to create a new court report.

Court reports require both case-level information (such as a case progress summary) and person-specific information (such as about the health and well-being of each child, parent, or Adoption Petitioner/Guardianship Movant on the case). Completing a court report in STAAND will therefore require the Social Worker to enter case level information and also to "click into" each person on the case to complete their individual information.

Upon completing a Court Report, the Social Worker submits it to their Supervisor for approval, and it proceeds up the chain of command (as required by each report type). Upon the last needed approval, most reports are automatically transmitted to court and an email containing the report is sent to the AAG (cc to the SW and SSW). Once approved, Adoption and Guardianship reports must be manually transmitted by the AAG to court.

Getting help on Court Report narratives: In FACES, "help text" on the content for some court report narratives was available by clicking a question mark. In STAAND, this help is available with a query to CORA (the system's Case Management AI assistant). For example, in the "Helper" area of CORA, if you enter "Summary of Efforts to Engage Kin" the system will return this response:

> *Describe efforts you have made to identify and reach out to members of the extended family and support network (fictive kin), and the results of these efforts. For those who have been receptive, describe the plans for involving them in supporting the family (beyond serving as a potential placement resource). Detail any additional kin engagement efforts that are planned to widen the family's network of support.*

Click HERE for a tip sheet on using CORA, including narrative support.

A technical User Guide with step-by-step tip sheets, including on how to complete a court report, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

You can also get detailed instructions on completing different types of court reports from within STAAND in the "Steps" area of CORA, the system's AI assistant. Click HERE for a tip sheet on using CORA.

Finally, Click HERE for a practice guide on case management and documentation in STAAND with fathers (unknown, legal, putative or father-figures) – including specific instructions on Court Reports.

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Community Papering Consultations

What is a Community Papering Consultation?

Sometimes CFSA's best efforts to engage a family are unsuccessful, and a child remains at risk in their home. This may occur during an Investigation, on an IH case, or on an OOH case if the child in the home has a sibling in foster care. In these situations, the Agency may seek the court's involvement and support in promoting family engagement and/or in ordering out of home care for the child.

Community Papering Consultations bring these cases forward for a multi-disciplinary team review to determine (under guidance from the Office of the Attorney General), recommendations, next steps and an approach to the court. There are three possible outcomes of the consultation:

- Move forward with community papering for non-court-involved children (i.e., bring the case to court), seeking either conditional release (the child remains at home but with court oversight) or shelter care (out of home care).

- Gather additional information and reconvene.

- Do not seek court involvement at this time.

How does the Community Papering Consultation Process Work in STAAND?

Upon manager approval to pursue a consultation, the Social Worker makes the request in STAAND by completing the information at the Community Papering Consultation tab on a case. Submission of a request also assumes the following case management activities have already been undertaken:

- Efforts to engage non-custodial fathers or other family members.
- A request for a Diligent Search, with reasonable efforts to gather further information about people identified in the search.
- Efforts to convene an At Risk FTM.
- Gathering and uploading any supporting documents to the case record (e.g., attendance reports, medical records, custody orders, etc.).

Upon completion of these pre-consultation requirements and submission of a request, the clerical team will schedule the Community Papering Consultation. During the meeting, a scribe will document

notes, recommendations and next steps. Meeting participants who are given tasks will see those on their dashboard in STAAND.

A technical User Guide with step-by-step tip sheets, including how to navigate the Community Papering process, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Complaints

What is a Complaint?

When a Social Worker is seeking court involvement (either for an IH family or for a child on an OOH case who remains in the home) they can pursue Community Papering (click here for more information) or they may do an emergency separation (click here more information).

In either scenario, a Complaint must be written to initiate court proceedings. Complaints lay out the facts of the case or investigation, including the specific danger and safety concerns that have led to the Agency bringing the case to court.

When Do I Write a Complaint?

Since Complaints trigger court involvement, the timing for approval and submission is critical.

- **For emergency separations:** Once a separation is approved, a complaint must be written immediately so that the initial hearing can be scheduled by the court.

- **For Community Papering:** If a Community Papering Consultation recommends court involvement, a complaint (whether seeking shelter care or conditional release) must be written. Timing is important and the AAG will provide guidance on when the Complaint should be submitted for formal approval in STAAND.

How Do I Complete a Complaint in STAAND?

Complaints are completed in STAAND at the Legal tab on a case. They are written per-child and the "cloning" function can be used to avoid having to cut and paste content across children (click here for more information about cloning in STAAND).

Once a draft of a child's complaint is written:

- Social Workers provide a copy to their Supervisor to review for preliminary approval.
- When the Supervisor has preliminarily approved the complaint, the Social Worker emails the draft to the assigned AAG.
- When the AAG has given their approval, the Social Worker submits the complaint in STAAND for formal supervisory approval and automatic transmission to the court.

After the Complaint is transmitted to court:

- The Social Worker must email it to the AAG.
- The Social Worker must provide the family with notice about their upcoming court hearing. A pre-populated notice can be generated at the separation tab on the case. The Notice can be generated in English or Spanish.

A technical User Guide with step-by-step tip sheets, including instructions on writing and filing complaints, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Separation

Separations from a Case

How Do I Conduct a Separation on a Case?

When a Social Worker has received a supervisor's verbal approval to separate a child, the separation information must be entered in STAAND. This includes:

- Identifying the type of separation: Pre-Court Custody, Court Ordered, or Voluntary Relinquishment (i.e., a surrendering of parental rights).
- Identifying the category of separation: Community Papering, Emergency Separation, Revocation of Protective Supervision.
- Providing required information about case circumstances.
- Confirming that required steps have been taken, such as submission of a Separation FTM referral and Diligent Search request.

Separations require formal supervisory approval. Once the SSW has approved the separation, the Social Worker submits a placement request, which serves as notification to placement teams so they can begin searching for a placement for the child. A Placement request must also be submitted. Click HERE for information on submitting a placement request.

What about the Complaint?

If the Social Worker is undertaking an emergency separation, the Complaint must be completed and approved immediately. Click HERE for information on completing a Complaint.

For non-emergency separations, a complaint has likely already been completed. It does not need to be updated.

What's Next?

Upon supervisor approval of a separation, the Social Worker will see a series of separation-related tasks on their dashboard, such as submitting a placement request and generating a Ward Letter.

In addition, the clerical team charged with scheduling the Separation transfer staffing (formerly "RED Team meeting") will see the approved separation on their dashboard.

Upon case connect by the Investigative team, the Kinship Administration manager and clerical staff will receive an email notice so that FTM coordinators and facilitators, PEERs and other staff can be assigned.

A technical User Guide with step-by-step tip sheets, including instructions on how to enter a separation from a case, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Placement

Placement Requests

In STAAND, a single form is used to make all placement requests: initial requests, placement change requests and respite requests. Each of these request scenarios is described below.

Initial Placement Requests

Initial Placement Requests for children entering or re-entering out of home care are made by the Social Worker who is doing the separation. The timing of the request depends on the type of separation that is coming:

- **Emergency Separations.** When a Social Worker is in the community and has received verbal approval from a supervisor to separate a child, they can initiate the Placement Request on their mobile device, or the Supervisor can do it from their desktop.

  As much information as possible should be provided to help with placement matching. When necessary, the Social Worker can return to a submitted Placement Request form later to add detail.

- **Community Papering Separations.** When a Community Papering Consultation results in a recommendation for shelter care, the Social Worker completes the Placement Request form. For the "Date Placement Needed," Social Workers should enter the Initial Hearing date, which will be provided to them by the AAG.

- **Anticipated Separations.** If a separation is likely to happen in the near future (e.g., a child is being discharged from the hospital, or a revocation of protective supervision is expected), the Social Worker completes a Placement Request form. For the "Date Placement Needed," Social Workers should enter the anticipated separation date.

Placement Change Requests

Placement Change Requests can be made under a number of circumstances, such as: when a kin resource has been found; a child and Resource Parent are no longer a good fit; or the child's time in a Congregate facility is coming to an end.

When making a placement change request, the Social Worker selects a reason for the change. Options include that the youth is, or will be, in residential treatment, boarding school, college, a

hospital or jail. Youth who are absent (formerly known as “abscondence”) will require a placement change request once they are located and need a placement.

Respite Requests

Respite requests can be made to give Resource Parents some brief time away from the responsibilities of caring for a child in foster care. To qualify as a respite request, the child is expected to return to the original provider. If not, it is a placement change request.

How do I Make Placement Requests in STAAND?

The Placement Request form (for initial, re-placement or respite requests) is available on the case at the Placement tab.

Note! The placement request form includes an age-specific assessment tool, so that the placement team has much information as possible with which to find a strong match for the child. If, at the time of a placement change request, the child has aged into an assessment grouping that is different from the one they were in during their last placement, the assessment should be re-done.

A technical User Guide with step-by-step tip sheets, including instructions on how complete a placement request, can be found on the CFSA website: STAAND | cfsa in the “Clinical Case Management” section of the table.

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Using Teamwork to Support Placement Stability

Placing a child in out of home care is one of CFSA's most fundamental responsibilities, with enormous impact on a child's emotional stability and well-being, as well as their path to permanency. Because the work involves staff across many work areas, consistent communication and collaboration are critical.

Priority #1: Place with Kin

When placed with kin, children have fewer disruptions and can achieve permanency more quickly. As a result, one of CFSA's top objectives during an Investigation and on an In Home or Out of Home case is to find as many relatives and members of a family's extended network as possible and engage them as active participants and/or as potential placement or permanency resources.

When the Placement team is alerted through a Placement Request (click HERE for more information) that a child has been, or will be, separated, efforts to establish kin as the placement resource are intensified. A Kinship Licensing Social Worker (KLSW) and/or a Kinship Resource Development Specialist (KRDS) are assigned to the case to work with the team on identifying and licensing kin. Only if these efforts are unsuccessful will a traditional resource home placement be sought.

A Temporary Kin License, which is valid for 150 days, can be issued within hours of a Placement Request, or may take a few days to complete, depending on the agency and family's ability to quickly provide fingerprints, address any physical space requirements, or meet other licensing requirements.

The Social Worker, KLSW and KRDS should be in ***close contact*** throughout the kin licensing process.

When Kin Aren't Available…

When kin aren't able to be placement resources, the Placement team (Resource Development Specialist, Placement Supervisor and Program Manager, and Resource Parent Support Workers) uses the information in the Placement Request form to identify the strongest match between child and resource parent. Priority is given to placement in DC, with a sibling already in care, or with a previous resource parent.

The Placement team reaches-out to prospective Resource Parents to share information about the child and assess their interest and availability, including discussing work and transportation obligations.

The Social Worker and Placement team should be in ***close contact*** throughout the matching process.

Once a Placement is Confirmed

- **Planning for immediate Needs.** Once a placement has been confirmed, the Kinship RDS or Resource Parent Support Worker (RPSW) and Social Worker collaborate – with each other and with other CFSA team members – to determine how the resource family's immediate needs will be met, such as securing baby supplies, childcare, school transportation or behavioral supports.

  The RPSW or Kinship RDS communicates with the Resource Parent about the plans, paying special attention when placements happen late on a Friday to ensure resource parents have a point of contact for the weekend. The Social Worker should be kept up-to-date about which resources are needed and being provided.

- **Gathering the child's belongings.** When collecting the child*, the separating team* (the separating worker and their SSW) is responsible for gathering their belongings – what's needed (such as shoes, a coat and medications) as well as what's wanted (such as a favorite toy, book or photograph). Only under the most dire circumstances should a child be brought to a resource home without their belongings, or left there without them for more than 24 hours (and a supervisor must be informed).

  None of a child's belongings should ever be transported in trash bags. Prior to placement, the separating team ensures that luggage is obtained from the donation center, as well as any other needed items.

- **Physically placing the child**. Following a health screening at CFSA, *the placing team* (the separating worker, their SSW, or the placing worker, if different) ensures a "warm placement" by providing the Resource Parent as much information as possible about the child's experience in the preceding 24 hours (e.g., for a baby, when did they last nap? For a teenager, how are they coping with the separation?). If the placing worker does not have this information, the separating supervisor is responsible for briefing them.

  The placing worker should also provide the resource parent with information about the REACH help line (883-443-3775) in case of an emergency after business hours and ensure they have the child's Placement Packet. Beginning in 2026, children's placement packets will be available in the STAAND Resource Parent portal.

Ongoing Teaming for Placement Stability

The primary team supporting placement stability and permanency for a child in foster care is made up of the Social Worker, the Resource Parent, and the assigned Resource Parent Support staff.[2] Generally, the "duties" divide up like this:

[2] For Kin Resource Parents under a temporary license, this support is provided by the Kinship RDS; for traditional resource parents (or kin parents with a full license) the support is provided by the RPSW.

- **Resource Parents** provide care for the child around the clock and are responsible for communicating concerns and needs (as well as positive reports!) to CFSA.

- **Social Workers** visit the child and help support their well-being; arrange for Family Time; help coordinate appointments; and work towards permanency.

- **Resource Parent Support staff** support placement adjustment; provide crisis response; help meet concrete needs in the home; coach and support skill building; and help with licensing.

In addition to SWs and Resource Parent Support staff, Resource Parents also have direct contact with other people from CFSA, such as Nurse Care Managers, FSWs, subsidy workers and re- licensing workers. Because the team is large, Resource Parents are sometimes unclear about who is responsible for what when it comes to supporting them and the child in their home. ***Regular, clear communication across the team is the answer!***

How STAAND Can Help Support Teaming for Placement Stability

STAAND has a number of features that will help the full CFSA team work collaboratively to support children and their resource families:

- **Case team.** At the General Tab on a case, the full list of CFSA staff who have been assigned to work on a case is displayed. This includes Kinship RDS's, Resource Parent Support Workers, FTM coordinators, and Nurses.

- **Contact notes.** STAAND contact notes more clearly identify the work area and type of work being documented. For example, notes completed by a Nurse or Placement RDS, or subsidy worker will be easy to see in the list of all notes on a case.

- **Placement requests.** The STAAND placement request form pulls information already in the system, reducing the amount of data entry for the Social Worker. In addition, there is only one form (for kinship or traditional placement), and the form includes an age-based questionnaire that allows the Social Worker to provide clinical input about the child and their needs.

- **Placement process.** A Social Worker can view the live communication across the placement team (kinship or traditional) to better understand where things stand with a placement.

- **Resource Parent Portal.** Beginning in 2026, Resource Parents should be able to electronically access information previously held in a paper "Passport" notebook. This includes both general information about being a resource parent and child-specific material for children in the Resource Parent's home (e.g., a Ward letter). From the Resource Parent portal, they can also communicate directly with their assigned support worker.

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Permanency Tracking

OOH Permanency Goal Review Meetings (PGRMs)

What is a Permanency Goal Review Meeting?

Out of Home Permanency Goal Review Meetings (PGRMs) are periodic, multi-disciplinary case reviews focused on strategies for achieving timely permanency for children in foster care. PGRMs occur at about 100 days after a child enters care, at nine months in care and then every three months after that.

During a PGRM, the barriers to permanency that a family and/or child is facing are discussed, and next steps for the team are identified. The barriers to achieving permanency fall into these seven categories:

- **Parental barriers and challenges** such as incarceration, relationship violence or lack of engagement.
- **Child factors impacting permanency** such as mental health or CSEC issues.
- **Permanency Resource factors** such as outstanding licensing issues.
- **Administrative delays** such as for ICPC approval, paternity establishment or evaluations.
- **Attorney delays** such as turnover or late filing of a petition.
- **Court delays** such as non-consecutive trial scheduling or judge transitions.
- **Agency delays** such as late identification of kin or insufficient efforts with parents.

Documentation of a PGRM does not begin from scratch at every review. If a child has been reviewed before, the meeting scribe begins with the barriers and next steps identified in the previous PGRM and updates them.

Where do I find PGRM information in STAAND?

PGRM information is held at the Permanency Tracking Tab on a case.

A technical User Guide with step-by-step tip sheets, including instructions on how to view and document PGRMs, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

You can also get detailed instructions on how to document a PGRM from within STAAND in the "Steps" area of CORA, the system's AI assistant. Click HERE for a tip sheet on using CORA.

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Approval for Goal Change Recommendations
(For APPLA or Guardianship for Young Children)

When and Why is Approval Needed for a Goal Change Recommendation?

The Court will consider changing a child's permanency goal away from Reunification following an Agency recommendation (made in a court report) and a goal change "praecipe" filed by the AAG. In other goal change scenarios (such as from Adoption to Guardianship or from Guardianship to APPLA), the praecipe is not required.

Most of these goal change recommendations are discussed by the team in Permanency Goal Review Meetings (PGRMs), after which the SW and AAG take the steps needed to communicate the recommendation to the court.

For two types of goal change, formal CFSA management review and approval (up to the Deputy Director) is also required *before* the SW and AAG can recommend a goal change to the court. These are:

- **Seeking a goal of APPLA (Alternative Planned Permanent Living Arrangement).** To the greatest extent possible, CFSA works to secure a permanent family for all children in foster care. An APPLA goal means a youth will age-out of foster care *without* an identified permanent family. It is therefore considered a goal of last resort, and approval is required.

- **Seeking a goal of Guardianship for a child under age 14.** Guardianship is a less permanent outcome than reunification or adoption because a guardian can undo their relationship with a child without legal consequences. As a result, CFSA supports a guardianship goal for a child in foster care only when neither reunification nor adoption is viable. Thoroughly assessing whether Guardianship is the best (or only) option is especially important for younger children, whose need for a long-term, legally permanent family is especially critical.

How Do I Submit a Goal Change Request in STAAND?

The Goal Change request form (for an APPLA goal or for a goal of Guardianship for a child under age 14) is found at the Permanency Tracking tab on a case.

A technical User Guide with step-by-step tip sheets, including instructions on submitting a goal change request form, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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TPR Evaluation

What is a TPR (Termination of Parental Rights) Evaluation Form?

CFSA works to reduce the time a child spends in foster care to the greatest extent possible. The Agency follows federal guidelines that seek reunification of a child by 12 months from separation. When children are in foster care longer than this, the parents can face action by the Agency to terminate their parental rights (TPR).

Federal guidelines require CFSA to either file a motion to terminate parental rights when a child has been in foster care for the most recent 15-month period, or to elect ***not*** to file a TPR, based on case circumstances. Assessing the case for a TPR direction at the 14-month mark aligns with federal guidelines and supports permanency planning in general.

How and when do I complete the TPR Evaluation form?

To ensure timely evaluations, when a child with a goal of reunification has been in foster care for 14 months, the Social Worker will see a task on their dashboard to complete the TPR Evaluation.

Completion of the form involves answering a set of complex legal and clinical questions. ***Social Workers must therefore complete this evaluation in collaboration with the assigned AAG.*** The TPR form does not require supervisory review or approval.

The TPR Evaluation form can be found on the Permanency Tracking Tab on a case.

A technical User Guide with step-by-step tip sheets, including instructions on how to complete a TPR Evaluation Form, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Case Closure

OOH Protective Supervision

What is Protective Supervision on an OOH Case?

Protective Supervision is the final stage of a Reunification case, in which the children exit foster care and return to the home from which they were separated (or to another parent's home) with a time-limited period of continued agency engagement and support to ensure progress and safety.

Generally, the Protective Supervision period lasts about three months, during which there are regular visits and other case management activity with the children and family.

How is the Protective Supervision Period launched in STAAND?

When the court orders Protective Supervision for a child in out of home care, the SW updates the child's legal status accordingly, and STAAND automatically end dates their separation, placement, and paid services.

In addition, upon the change in legal status, STAAND will send a task to the Social Worker's dashboard, to be completed within 24 hours if possible, to discontinue the child's Medicaid (a process that takes place outside of STAAND).

How and When does Protective Supervision End?

As the Protective Supervision period is winding down, the Social Worker may want to connect the family with a Collaborative for post-case-closure support. The CFSA Community Engage and Connect Unit (CECU) no longer provides this service.

Whenever the Social Work team assesses the children to be safe, and the family ready to end Agency involvement, they work with the AAG to request case closure from the court. Upon receipt of the court order, the case can be closed (Click here for more information about OOH case closure).

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Closing an In Home Case

When Do I Close an In Home Case?

An In Home case is ready to close when the Social Worker and Supervisor are confident that safety risks have been sufficiently reduced.

Practice steps that support a determination of readiness to close include creating a sustainability plan with the family and assessing them for a short period of on-going support from a Collaborative.

How Does IH Case Closure Work in STAAND?

The Closure Tab on an In Home case is where a Social Worker goes to:

- Complete a Sustainability Plan.
- Provide details such as the closure reason and confirmation that CKPs on the case have been reviewed and updated.
- Complete a closure summary narrative.

NOTE: in order to close the case, there must be ***either*** a closure narrative or a sustainability plan. Both are not required.

At any time, the Social Worker can run a "Closure Audit" by clicking the button in the top ribbon, to make sure there are no outstanding items on the case. Upon submitting the closure to the Supervisor for approval, the audit will run automatically. Social Workers can monitor the status of the closure approval on their Dashboard. Upon supervisory approval, the system will close the case.

A technical User Guide with step-by-step tip sheets, including instructions on how to close an In Home case, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Closing an Out of Home Case or Child

When Do I Close an Out of Home Case or Child?

Out of Home cases may be closed "as a whole" – meaning all children on the case close at the same time and for the same reason. Or, if individual children on the case have their own timeframes and/or reasons for closure, they must be closed individually. When the last child on a case is closed, the case itself is automatically closed.

> **REMEMBER: Exiting Foster Care is Not the Same as Case Closure!** Children or youth who leave placement and enter Protective Supervision with their family have exited foster care. However, their case remains open, with all case management visits and work on-going, until the court orders case closure. Click here for more information about Protective Supervision.

How Does OOH Case Closure Work in STAAND?

Full Case Closure

If all children on an OOH case are closing at the same time and for the same reason, once CFSA receives the closure order from the court, the full case can be closed. The Social Worker navigates to the "Closure" tab on the case and provides the following information:

- The case closure reason
- Confirmation that Medicaid termination forms have been completed and submitted for all children on the case.
- If all children are aging out of care, confirmation of Medicaid transition paperwork as well as a Transitional Care Package(s).
- Confirmation that a housing plan has been completed for any youth on the case who is age 16 or older.
- A closure summary narrative

At any time, the Social Worker can run a "Closure Audit" by clicking the button in the top ribbon, to make sure there are no outstanding items on the case. Upon submission of the closure to the

Supervisor for approval, the audit will run automatically. Social Workers can monitor the status of the closure approval on their Dashboard. Upon supervisory approval, the system will end date the legal status for all children on the case, as well as their placements and separations.

Individual OOH Child Closure

When CFSA has received a closure order from the court for an individual child on a case, from the child's Case Person record, the Social Worker will navigate to the "Case Person Closure" tab and provide the following information:

- The child's closure reason
- Confirmation that a Medicaid termination form has been completed and submitted.
- If the youth is aging out of care, confirmation of Medicaid transition paperwork as well as a Transitional Care Package.
- Confirmation that a housing plan has been completed if the youth is age 16 or older.
- A closure summary narrative

At any time, the Social Worker can run a "Closure Audit" by clicking the button in the top ribbon, to make sure there are no outstanding items. Upon submission of the closure to the Supervisor for approval, the audit will run automatically. Social Workers can monitor the status of the child's closure approval on their Dashboard.

Upon supervisory approval, the system will end date the child's legal status, placements and separations. And the child's case will be closed. The rest of the case remains open.

Important note on youth aging out of care: CFSA does not have jurisdiction over youth once they have turned 21. If a closure order for a youth has not been received by their 21st birthday, the Social Worker must still close that youth's case, following the above process.

Adoption and Guardianship Closure

When a child in foster care will be adopted or have a finalized legal guardianship, the case closure process has an added dimension related to subsidy payments.

Once the court finalizes the Adoption or Guardianship, the child's main court case (aka their neglect case) can be closed, but their related Adoption or Guardianship case will stay open so the subsidy can be provided.

However, CFSA *does not* close a child's main case until the Subsidy is approved and ready to begin,

otherwise the Adoptive Parent or Guardian may experience a gap in payment. So, when a Social Worker requests closure of a child to Adoption or Guardianship, and the Supervisor approves it, the case *does not* automatically close. Instead:

- First, STAAND sends an email notification to the Subsidy team indicating that the child's main court case is ready to close.

  NOTE: after approval to close but before the start of the subsidy, the OOH Social Worker continues to complete required visits.

- Once the subsidy begins, STAAND automatically end-dates the legal status, the separation, the placement and the case person, which closes the child's main case. This process was previously known as "Splitting the Case."

- STAAND also sends an email notification to the Social Worker, Supervisor, Resource Parent Support Worker and Placement RDS indicating that subsidy has begun and the child's neglect case has closed.

For more information

A technical User Guide with step-by-step tip sheets, including instructions on how to close an Out of Home case or case person, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Other Aspects of Case Management

Case Management Dashboards

All case management staff have individualized dashboards in STAAND.

What Can I See on My Dashboard in STAAND?

IH and OOH Social Worker dashboards display:

- Assigned families
- Visits
- Work products (e.g., case plans or court reports) due and pending approval
- Other tasks

IH SWs can also see the status of case transfers from an Investigation, safety plans, and community papering consultations.

Managers can see these items, and can take actions directly from their dashboards, such as assigning cases or approving work products.

How do Dashboards support case coverage and management review within or across teams?

Just as in FACES, in STAAND Social Workers within a supervisory unit can see and edit information on any case in their unit. Managers have visibility and editorial rights in other management units.

As a result, temporary coverage of another person's assigned families can easily be undertaken. For example, if a SW or SSW will be out for a day another person can cover; or if a SW is going to a school and is able to visit with children from another worker's case, they can document the contact directly in in that case.

To facilitate coverage, within their dashboard, a SW can change to a Unit view so they can see other SWs' caseloads. Similarly, SSWs and other managers can use their dashboards to assess workload across their unit, as well as others' units (e.g., the volume of court reports upcoming) in order to make coverage decisions.

If coverage is needed for an extended period of time, the SSW should transfer case assignment to the covering worker. Click here for detail on executing case transfers in STAAND.

How Do I Find My Dashboard in STAAND?

A technical User Guide with step-by-step tip sheets, including instructions on how to navigate dashboards, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Tasks

What are Tasks in STAAND?

STAAND captures a running list of tasks that a Social Worker, or any CFSA staff member working on a case, is responsible for completing. There are two types of task in STAAND:

- **System-generated tasks.** These are tasks that are created by STAAND based on pre-established deadlines or criteria, such as: a court report being due; a PTC needing to be scheduled; or things that always need to be completed following a separation (such as completing a Ward letter).

- **User-Generated Tasks.** These are tasks that are manually entered into the system by a STAAND user, such as a manager or scribe. These tasks may be identified during an FTM, Community Papering Consultation, PGRM or case transfer staffing. Examples of user-generated tasks include applying for a Social Security Card or submitting an Assessment Center referral. Social Workers (or any STAAND user) can also use the Task function to create reminders for themselves!

How Do I Use Tasks in STAAND?

Task lists can be viewed in two places in STAAND:

- **At the Tasks Tab on a case.** This displays all tasks *on that case*, regardless of who is assigned to complete the task.

- **On a dashboard.** On a Social Worker (or other team member's) dashboard, all tasks assigned *across all their cases* are listed.

System-generated tasks (such as a court report) are automatically removed from the Task list once they are completed. Otherwise, the user can mark tasks as complete from the Task grid. Users can also update or add outcomes to a task so that others can see what has been accomplished.

> For example, if a SW was tasked during a PGRM with referring a parent for parenting class, once they have done so, they can update that task ("Referral made to Mary's Center on 11/19/24").
>
> Wherever the task appears in STAAND (i.e., on the dashboard, on the case or in the PGRM record), it will be updated. If the task is marked complete it will come off the case and dashboard task lists, but will remain (completed) on the PGRM record.

A technical User Guide with step-by-step tip sheets, including instructions on how to use Tasks in STAAND, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Safety Alerts on a Case

What are Safety Alerts on a Case?

For the CFSA team working with a family, communication about safety concerns is critical. A safety concern may, for example, affect a Social Worker or Nurse Care Manager's plan to visit a family in the home, or alter the location of a visit being supervised by an FSW or member of the Innovative Family Support Unit (IFSU).

In STAAND, team members will be able to place an alert banner on a case or an individual case person indicating that there is a safety concern. The detail on the safety alert is entered in a contact note with "Safety Alert" as the additional title or subject. This way, other team members can easily find the alert in a long list of contact notes on the case.

Case Management staff should be in the habit of looking in STAAND before they engage with a family so they can be fully up-to-date. This will also reduce reliance on (and the volume of) email and text communication.

How Do I Post or Remove a Safety Alert?

A technical User Guide with step-by-step tip sheets, including instructions on how to use Safety Alerts, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Translating Case Documents

Three types of documents are available in STAAND already translated into Spanish. There are different steps needed for generating each of these:

- **Safety Plans**. After you have created a Safety Plan, at the Documents Tab you will see both the English and Spanish versions available. Select one to generate the PDF.

- **Notices to Appear in Court.** At the Separation Tab on a case, there is a section in which new notices can be generated. The document language can be specified along with the other elements of the notice.

- **Authorizations for Release of Information.** On a case, there is an "Authorizations" Tab. To find it, go to the elipses ("...") at the end of the tab list. After creating a new authorization document, you can select the language. Upon completing all the required information, select "Submit" in the top ribbon and then find the authorization document at the "Document Covers" Tab.

If you need these documents in a language other than English or Spanish, you must request it through CFSA's translation services. Similarly, other documents you need translated so you can share them with a family (e.g., a Family Roadmap or a Case Plan), must go through the translation service.

At the Administrative Service link (https://octo.quickbase.com/nav/app/bt7q7ws9u/), under Language Requests, select "New Language Request" and complete the form.

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Capturing Education & Health Information in STAAND

STAAND has the capacity to hold a lot of detail about a child's education and health. For example:

Education information that can be captured in STAAND:

- School enrollment details
- Attendance
- Grades

Health information that can be captured in STAAND:

- Appointment details
- Allergies
- Medication
- Diagnoses
- Youth pregnancies

Education and health information live on a child's person record, but key data points are automatically carried over to their case person record so that they can be used in case plans, court reports and other documents where the information is required.

Who Enters and Updates Education and Health Information?

IH and OOH Social Workers can expect that basic educational details (such as a child's school and grade) are entered into STAAND by the Investigating team and will populate to the case. Similarly, if the investigator gathered information such as a doctor's name and number or any diagnoses for a child, they would enter it in STAAND and it would populate to the case. If the information is not there upon receiving a case, the SW must add it themselves.

As the case progresses, other team members (such as Healthy Horizons staff, Nurse Care Managers, and OWB or OYE Education Specialists) should be entering and updating this information as a part of their work with a child or family. IH and OOH Social Workers should also be helping to keep this information up-to- date if, for example, they accompany a child to a medical appointment, or they participate in a school IEP meeting.

However, note that for health-related information, Social Workers should not be entering clinical data points (such as medication dosages or diagnoses) without direct consultation with medical professionals.

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Youth Bill of Rights (YBOR)

What is the Youth Bill of Rights (YBOR)?

The Youth Bill of Rights is a document that describes the rights of a child or youth in foster care. All children (regardless of age) must have a YBOR on file within 30 days of entering care. If they are age 14 or older, they can sign it themselves. If they are younger than age 14, the GAL signs on their behalf.

How Do I Complete a YBOR in STAAND?

In STAAND, OOH Social Workers will see a task on their dashboard for completing a YBOR as soon as a a child to whom they are assigned has entered foster care.

The YBOR consists of an explanatory brochure and a signature page. Both documents are available on the CFSA website (Youth Bill of Rights | cfsa). The signature page, when complete, should be uploaded to the case.

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ICPC

What is ICPC and What is the Social Worker's Role?

The ICPC (Interstate Compact on the Placement of Children) is a process through which CFSA seeks to approve foster care, adoption/guardianship homes for prospective resource parents (usually kin) who live out-of-state and who want to provide a home for a DC child in foster care. PRTFs (Psychiatric Residential Treatment Facilities) out of state also require an ICPC.

Social Workers help identify these out-of-state placement and permanency resources, and then submit information about them to the CFSA ICPC team. The ICPC team serves as a liaison with the other state. That state's official has to then work with the county/local office to get the home licensed. This process generally takes about 150 days, but it can be shorter or longer depending on circumstances.

Once the license is approved and the child is placed, the CFSA ICPC team receives quarterly reports about the child and their placement from the state in which the child is living. The CFSA social worker continues routine case management activity for family remaining in DC.

What About Homes in Maryland?

DC and Maryland have a "border agreement"[3] which allows CFSA to place DC children in Maryland foster homes without an ICPC process, as long as they are managed by CFSA-contracted agencies, such as NCCF, PSI, or LSS. As a result of this agreement, no ICPC forms or processes are required for foster care placement in Maryland.

However, if a Maryland-based family wants to become a child's permanent home through adoption or guardianship, then the Social Worker must initiate the ICPC approval process.

How Does the ICPC Process Work in STAAND?

ICPC for Out-of-State Foster Care Placements

When a Social Worker identifies an out-of-state placement or permanency resource for a child, they complete and submit the ICPC foster care referral (called "Form 100A"), which is a request that a home be assessed and, hopefully, approved or licensed. Previously, the 100A was completed on paper; it will now be accessed, completed and submitted within STAAND; this includes the required cover letter signed by a CFSA manager (PM and above).

Once a prospective out-of-state resource parent is approved or licensed, the child can be placed with them. Upon placement, the Social Worker completes and submits the 100B form in STAAND, which

[3] 2023-05-31_DC_MD_Border_Agreement_DHSFINAL 07.18.2023.pdf

alerts the receiving county's social work team, so they can begin ongoing supervision and monitoring of the placement.

ICPC for Out-of-State Adoption or Guardianship

If a child will be adopted or obtain a legal guardianship with a family outside of the District of Columbia (including in Maryland), when the child is legally free for adoption, or a guardianship motion has been filed, the Social Worker must complete and submit new 100A and 100B forms in STAAND.

Where do I go to Submit ICPC referral forms?

On the case, the Social Worker navigates to the ICPC Referrals Tab to access and submit the forms.

A technical User Guide with step-by-step tip sheets, including instructions on how to create an ICPC request, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

A dedicated tip sheet on the ICPC process is coming soon and will be available the link above.

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Permanency Specialty Unit
(formerly "Post Permanency")

What does the Permanency Specialty Unit do?

The Permanency Specialty Unit (PSU) provides crisis intervention services, referrals to various programs, resource information, adoption search information, and support to families who have finalized adoptions and guardianships in the District of Columbia. These services are provided to prevent disruptions and/or dissolutions, and to educate, support, empower, and stabilize families.

For children and families who are (or have been) engaged with CFSA, the PSU works on the following case types:

- **Safe Haven Babies.** If a newborn baby is surrendered in the hospital, the PSU places them in a CFSA-licensed pre-adoptive home and works with the adoptive family to complete the adoption process. There is no foster care case and a parent who surrenders their newborn will not be investigated or substantiated for neglect.

- **Finalized adoptions or guardianships in need of support or at risk of disruption.** If a child has achieved permanency through adoption or guardianship, and the family or child is in need of additional support, the PSU will work with that family to resolve the concerns and maintain the adoption or guardianship.

The PSU also does the following work:

- **Independent Adoptions.** An independent adoption is one in which the children are not committed to CFSA, nor are they wards of the District of Columbia. In these adoptions, the birth parents have usually consented to the adoption by the pre-adoptive parents.

  Independent Adoptions include:
  - Step-parent Adoptions
  - Grandparent/Relative/Fictive Kin Adoptions
  - Adult Adoptions
  - Same Sex/Civil Union/Second Parent Adoptions

- **Adoption Searches ("Break Seals").** CFSA serves as an intermediary for the DC Superior Court and the US District Court for the District of Columbia in order to: 1) review sealed adoption records; 2) help locate adoptees or biological family members; 3) investigate the interests of biological parents and other family members with regard to having their identities revealed to the adoptee; and 4) investigate an adoptee's interests in locating their biological family.

- **Out of Town Inquiry (OTI) cases**. When a DC-based family has been identified as a permanency resource for a child from another jurisdiction, an OTI case is opened by the CFSA ICPC Unit, and a worker from the PSU monitors the case.

How Do Permanency Specialty Unit Cases Work in STAAND?

The PSU operated outside of FACES. Their work on these cases will be new in STAAND and is still under development.

Safe Haven Baby Cases

When CFSA receives a call about a Safe Haven Baby, the PSU Manager is alerted and they create and assign the case.

Guardianship Cases

If a legal guardian is in need of support, they can reach out to CFSA through the guardianship helpline, direct calls to the PSU, or through the CFSA hotline. These situations may also come to CFSA's attention upon receiving notice of a motion filed in court to modify or terminate a guardianship.

Under any of these circumstances, if a motion to modify or terminate the guardianship is granted by the court, the following outcomes may result:

- The child moves in with a successor guardian, who then may become eligible for other benefits such as TANF or the Grandparent or Close Relative Caregiver subsidy. If the successor guardian obtains legal custody, they may also be able to secure additional benefits.

- The child is reunified with a parent. If the court places the child with that parent under Conditional Release, the closed foster care case is reopened as an In Home case (the child's legal status must be updated)

- The child is separated, a new episode of the child's OOH case is established, and the case is assigned to an OOH team. NOTE: the closed foster care case (NOT the guardianship case) is the case that is reopened. The child may be placed with a successor guardian/kin or with a traditional resource family.

- The youth is 18 years old or older. CFSA works with the youth to secure stability and then closes the PSU case.

Adoption Cases

If the PSU is contacted about a family that has a finalized adoption, they will work with the family to stabilize the situation. If, despite efforts, the adoptive parent is unable or unwilling to care for the child (or they have died), the family will be engaged with Investigations at CFSA (or the child welfare agency

in their jurisdiction), and it would become a CPS matter. After an adoption, a child or youth can only re-enter foster care following a substantiation of abuse or neglect against the adoptive parent(s).

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National Youth in Transition Database (NYTD) Surveys

What is NYTD?

The National Youth in Transition Database (NYTD) is a federal data collection system that tracks independent living services, youth characteristics, basic demographics, and outcomes in six areas:

- Increasing youth financial self-sufficiency
- Improving youth educational attainment (academic or vocational)
- Increasing youth connections with adults
- Reducing homelessness among youth
- Reducing high-risk behaviors among youth
- Improving youth access to health insurance

The surveys completed by older youth (on services and these outcomes) are used to assess the agency's performance and enhance our work with older youth. Youth taking the survey at age 17 are referred to as the "baseline population." When they are surveyed again at ages 19 and 21 they are referred to as the "follow-up population."

How Does CFSA Meet NYTD Requirements?

All CFSA youth must be surveyed once they are 17 years old. The survey is invalid if completed more than 45 days before or after their 17th birthday and they are no longer included in the baseline population.

A random sample of the youth who were surveyed at age 17 are surveyed again at age 19. This sample of 19- year-olds is then surveyed once more at age 21.

Note: Youth may be in or out of care at ages 19 and 21, but they will still be surveyed. The NYTD Project Management Specialists, identified points of contacts and Social Workers should all make efforts to support the youth in completing the surveys.

The NYTD process, including all surveys, is integrated into STAAND.

1. For any youth meeting the age requirements above, STAAND will send an email asking them to take the NYTD survey in the STAAND youth portal.

2. If the youth does not complete the survey in the portal, the CFSA Program Management Specialists for NYTD will be notified. They, the assigned Social Worker, and other people involved in the youth's life will then support the youth in completing the survey (or document why the youth is unable to do so).

3. To increase survey completion, paper copies of NYTD cover letters and survey forms can be printed from STAAND and provided to the youth.

How Do I Access NYTD Material in STAAND?

NYTD surveys (and the status of their completion) can be found on the person record at the NYTD tab.

A technical User Guide with step-by-step tip sheets, including instructions on how to conduct NYTD work, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Missing, Absent or Abducted Youth

New Terminology in STAAND

CFSA has improved its policy and terminology for children or youth whose whereabouts are unknown. The term "Abscondence" is no longer in use. Instead, youth can be reported in one of three categories:

- **Missing.** a child under age 18 or a foster child under age 21 who is absent from their place of residence without the knowledge and/or consent of the caregiver, resource provider, or CFSA, and there has been no contact with the child, whose whereabouts are unknown.

- **Absent.** A child who is absent from their place of residence for less than 72 hours whose whereabouts are either known or unknown, but the child is in contact and is assessed to be at no immediate risk of harm. In some cases, a child may be absent for short periods repeatedly and regularly. Social workers must use the risk indicators below to assess whether the absence elevates safety concerns.

- **Abducted.** A child in CFSA custody, or who is part of an open Entry Services referral, or who has an open in-home case whose whereabouts are unknown and it is known or suspected that the child has been taken without permission, consent or in violation of a valid court order regarding the child's custody status from his or her placement (or home) or other location by a person or persons either known or unknown to the child.

- **High Risk Child.** A child who is missing, abducted, or absent and whose safety is compromised for one or more of the following reasons: The child:
    - Is age 14 years old or younger
    - Has one or more serious health conditions that require treatment or ongoing care (including prescription medications)
    - Is pregnant and potentially placing the unborn child at risk
    - Is parenting and the infant/child is believed to be with them, and the infant/child is potentially at risk
    - Has an emotional problem that requires treatment, without which the child may be a danger to self or others
    - Has a developmental or intellectual disability that impairs self-care
    - Has a serious documented alcohol and/or substance abuse problem and could be a danger to self or others
    - Is absent under circumstances inconsistent with their established patterns of behavior, and this absence cannot be readily explained
    - Is believed to be a victim of commercial sexual exploitation/sex trafficking. See the Sex Trafficking Identification and Response administrative issuance for more information

What Do I Do When a Child or Youth is Missing, Absent or Abducted?

When a child or youth falls into any of the above categories it is important to make a report to authorities and also to let the full CSFA team know.

Process for IH cases:

- **Entering a report**. When an IH Social Worker learns that a child or youth is missing or has been abducted (absent status is not applicable on an IH case), and the parent or caregiver has notified the police, the IH Social Worker enters the missing or abducted report information in STAAND. The system also automatically posts an alert banner on the person record and on the case.

- **Requesting a PPCO.** If CFSA believes that a missing child appears to be suffering from illness or injury, is in immediate danger, or we are unable to assess their well-being despite efforts to locate them, the IH Social Worker can request a Pre-Petition Custody Order (PPCO) from the court. The process for completing this in STAAND is under development. In the meanwhile, once the Report is approved by your Supervisor, reach out directly to the Missing Child Locator Unit (MCLU) at MAAC@dc.gov. MCLU will be responsible for submitting a PPCO Request to the Courts.

- **NCMEC involvement.** If the child or youth has been missing or abducted for more than 30 days, the CFSA Missing Child Locator Unit can submit a report to the National Center for Missing and Exploited Children (NCMEC), for their assistance in locating the youth.

- **Returns.** When the child or youth who was missing or abducted returns, the Social Worker enters a return date on the child or youth's missing/absent/abducted report record. This step will automatically remove the banners from the person and case.

  If a PPCO has been issued by the court, it will need to be "quashed" (rescinded). Until the quashing process is in STAAND, the Missing Child Locator Unit will be responsible for submitting a Quashing Order Request to the Courts. When the judge signs the quashing request, the AAG and MCLU will receive the Quashing Order.

Process for OOH cases:

- **Missing:** The Social Worker and/or Resource Parent makes a report to MPD that a youth over age 18 is missing. The Social Worker enters a Missing Report in STAAND, and the system automatically posts an alert banner on the person record and on the case.

- **Absent (formerly "abscondence"):** For youth under age 18, the Social Worker and/or Resource Parent makes a report to the police. The Social Worker enters an Absent report in STAAND, and the system automatically posts an alert banner on the person record and on the case.

  In addition, a custody order must be requested. The process for completing this in STAAND is under development. In the meanwhile, once the Report is approved by your Supervisor, reach out directly

to the Missing Child Locator Unit (MCLU) at MAAC@dc.gov. MCLU will be responsible for submitting a Custody Order Request to the Courts. When a judge signs the custody order, the AAG and MCLU will receive the Custody Order.

The nature of a custody order for a youth depends on the requesting agency or agencies. For example, if a youth in foster care is also on probation or has a probation officer, Court Social Services or DYRS would likely file their own custody order in addition to CFSA's. When the youth is located, they would be detained and have to appear before a judge. If CFSA is the only agency requesting a custody order (when a non-delinquent youth is absent from a foster home), the order can be closed without the youth having to appear before a judge.

- **Abducted:** The Social Worker and/or Resource Parent makes a report to MPD that the child or youth has been abducted. The Social Worker enters an Abducted Report in STAAND and the system automatically posts an alert banner on the person record and on the case. Custody order requests are *not* entered if a child or youth has been abducted because it is deemed a police matter.

- **NCMEC involvement.** Once a child or youth under age 20 has been reported missing, absent or abducted for more than 30 days, the MCLU can submit a report to the National Center for Missing and Exploited Children (NCMEC), for their assistance in locating the child or youth.

- **Returns:** When a child who has been missing, absent or abducted returns, the Social Worker enters a return date on the child or youth's missing/absent/abducted report record. This step will automatically remove the banners from the person and case, and close the missing/absent/ abducted report.

  If the child had been reported "Absent," the custody order must be "quashed" (rescinded). Until the quashing process is in STAAND, the Missing Child Locator Unit will be responsible for submitting a Quashing Order Requests to the Courts. When the judge signs the quashing request, the AAG and MCLU will receive the Quashing Order.

Using STAAND, Social Workers will be able to monitor a missing, absent or abducted child or youth's status more easily. They can also support finding the youth by uploading a picture and detailing locations the youth is known to frequent. Automatic referral to the court and to MCLU for an absent child or youth will save a Social Worker time and effort.

How Do I Enter a Missing, Absent or Abducted Report in STAAND?

To enter a Missing, Absent or Abducted report in STAAND, navigate to the person record, select "Report Missing or Absent" in the top ribbon, and complete the required information.

A technical User Guide with step-by-step tip sheets, including instructions on how to enter a report, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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STAAND Short Cuts for Case Management

Based on much input from CFSA Social Workers and other frontline staff, STAAND has been built to resolve some of the labor-intensive features of FACES. The system "short cuts" described in this section will help frontline staff more easily complete their assigned tasks and keep their case information up-to-date.

Shared Narratives

In FACES, completing documents with the same, or similar, content (e.g., Case Plans, YTPs or Court Reports) required Social Workers to "cut and paste" from one document into another, or from an earlier version of a document to the current version.

In STAAND, this cutting and pasting is not necessary: the system carries forward a Social Worker's most recent content, so that it can be reviewed and updated as needed, and then carried forward again to the next document that requires it. For example:

> A Summary of Case Progress is required for both Case Plans and Court reports. When a Social Worker begins a new court report, their most recent version of the "Summary of Case Progress" narrative (whether written for their last court report, or for a more recent Case Plan) will appear in the new court report so that it can be reviewed and updated. Then, the edited version of the narrative will automatically carry forward to the next report or plan that requires it.

This Shared Narrative functionality also applies to Case Objectives and Progress Ratings a Social Worker identifies in a Family Roadmap, Case Plan, YTP or Court Report. For example:

> A parent's service participation levels change over time. In a Court Report, the Social Worker indicates the parent is participating in parenting class "frequently." When the next Case Plan is due, "Frequently" appears as the participation rating for parenting classes. The Social Worker can maintain or change this rating, and the rating will then carry forward to the next document in which parenting class participation levels are assessed.

NOTE: While being able to review and edit past narratives (as opposed to starting from scratch each time) is a big advance, it will require SWs to thoughtfully review and edit their own work – a skill not everyone has.

Supported by their SSWs, Social Workers will need to practice this skill, and everyone will have to make sure that "old" information is not being carried forward without careful edits and additions.

Automatic Updating of Information Across the System

STAAND holds many, many pieces of information about people with whom CFSA works: from demographic facts (such as their birthday, address or race); to education information (such as their current school or grade); to health information (such as their doctor or the date of a last appointment). Each of these "data points" may be needed in various forms and documents used in case management.

In STAAND, a Social Worker will only have to make an adjustment to a data point (e.g., updating a child's school) in one place. Everywhere else that piece of information appears, it will display the updated version.

Cloning

A number of case management documents allow for "cloning" – meaning the current or active version of a document is copied into a new document and can be adjusted from there; the user does not have to re-enter or cut and paste all of the information from the original. For example:

- A Safety Plan should be updated if people or circumstances have changed. Instead of starting a new Safety Plan from scratch (and copying and pasting information from the old one), the Social Worker clones the active Safety Plan, changes the date and makes any other adjustments. Upon save, this is the new, active version of the Safety Plan.

- A Youth Transition Plan (YTP) is updated over time to capture changes to a youth's circumstances, life objectives and action plans. Instead of starting a new YTP each time, the meeting scribe clones the active YTP, changes the date and makes any other updates. Upon save, this is the new, active version of the YTP.

Documents that can be cloned are: Complaints, Family Roadmaps, Youth Transition Plans, Housing Plans, Safety Plans, and Family Time Plans.

Documents that cannot be cloned (e.g., Case Plans and Court Reports) use shared narratives instead (see above).

Click HERE for a tip sheet on cloning a document

"Record Sets"

When a document in STAAND (such as a case plan or court report) requires information about **multiple people** on the case, the "Record Set" feature allows a Social Worker (or any STAAND user) to select the individual people one by one from a separate pane on the STAAND screen in order to review or enter their details. The Social Worker does not have to return to the main screen over and over again to select the next person on the list.

The Record Set can also be used to navigate through **multiple items** that appear in a grid or list, such as

case plans, or episodes of a case.

> For example, most cases (especially longstanding ones) have a lengthy list of Contact Notes. If a user needs to search through Contact Notes to find a specific piece of information, by opening a Record Set they can review the content of each note without having to return to the main contact note list after reading each one.

A technical User Guide with step-by-step tip sheets, including instructions on how to use the Record Set function, can be found on the CFSA website: STAAND | cfsa in the "Clinical Case Management" section of the table.

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Using "AI" in STAAND to Support Your Case Management Work

How Can AI Help Me Do My Work?

As with all new things, it will take some time to get used to working in STAAND! Down the road, Social Workers will feel confident that they understand how the system works. They will know how to find the things they need. And, they will be able to seamlessly complete all of their required work products (like contact notes, case plans and court reports).

But in the meantime, there is an "AI Assistant" that can help: she is the "Siri" of STAAND, and her name is CORA. CORA offers help and information in four areas:

1. **The Ask Assistant.** Provides answers to questions like: What's a case person? or What's in a Family Roadmap? Note that the AI-generated content in this feature may sometimes be inaccurate (it is still under development). Be sure to consult with your supervisor as needed.

2. **The Narrative Helper.** Provides writing prompts and suggested content for the narrative fields in your case plans, psychosocial assessments, court reports and other case documents.

3. **Step-by-Step Guides.** Provides easy-to-follow instructions for completing Family Roadmaps, YTPs, Case Plans, Court reports and other case documents.

4. **Contact Note support.** Helps you create or improve a contact note on any case.

You can use CORA directly from the landing page, or you can "move it" to the side of your screen so that you can review the help *while* you are working on your case.

> For example, if you are working on a Case Plan and come across a required narrative about which you are unsure, you can put CORA's Narrative Helper on the side of your screen, look up the name of the narrative field, and then review the guidance at the same time you are typing into the narrative box on your Case Plan.

Click HERE for a tip sheet on using CORA.

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