HOW TO ASSIGN A RESOURCE DEVELOPMENT SPECIALIST WORKER TO A PLACEMENT REQUEST AND COMPLETE THE PLACEMENT PROCESS

CREATION DATE: October 1, 2025

This tip sheet will assist Placement Supervisors, Resource Development Specialists, and Reconciliation unit on how to assign and complete the placement process.

Pointers to Remember:

The assignment process will function the same for both Placement and Kinship, using the Kinship Master Dashboard.

Section 1: How to Assign a Resource Development Specialist to a placement request

Steps include:

Step 1: Navigate to the **Placement Requests Master Dashboard**.

Step 2: In the **Needs Assignment** subgrid, select the Placement Request needing assignment.

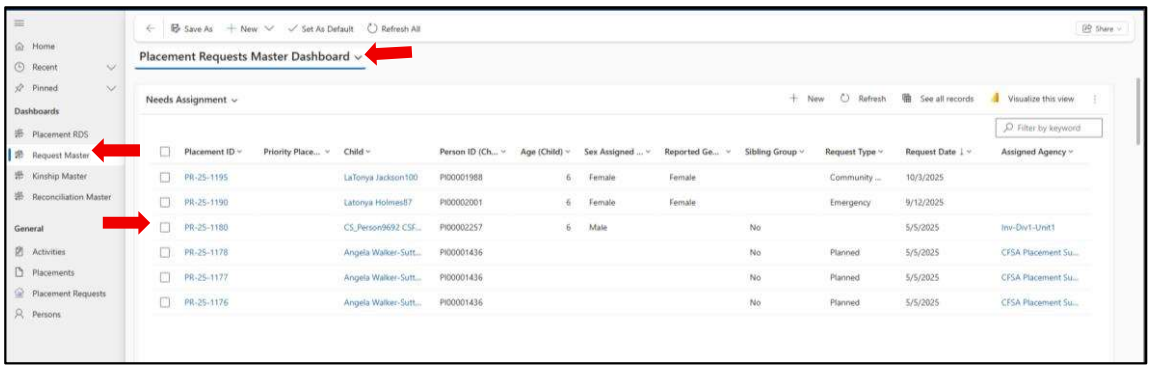

Figure 1

Step 3: Click on **Assignment** tab.

Step 4: Click on **+New Assignment**. If it is not visible, select the More commands option (3 dots).

Step 5: Select the **Assigned User**, **Role** and **Unit**.

Step 6: Click **Save and Close**.

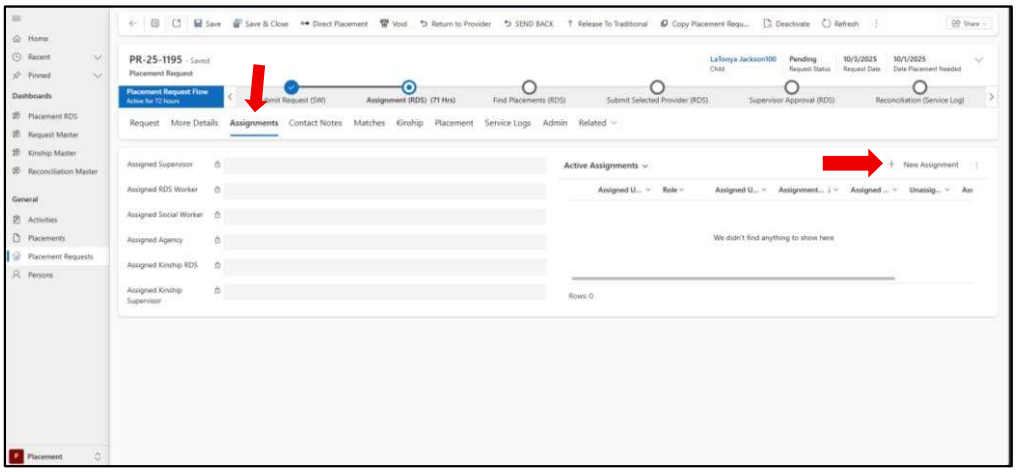

Figure 2

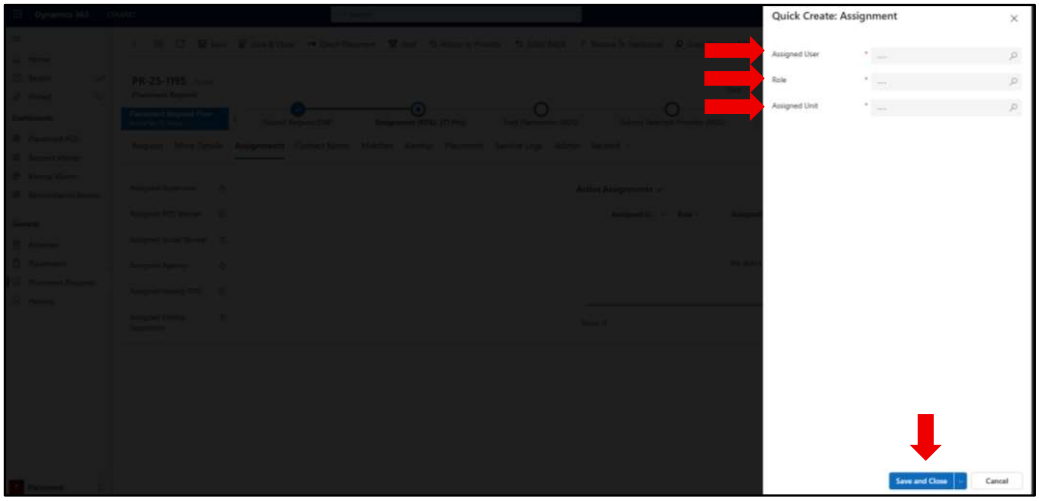

Figure 3

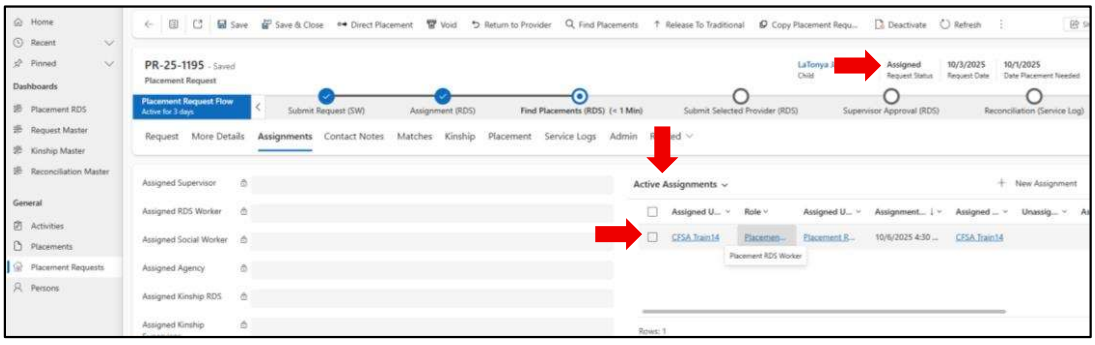

Figure 4

Note:

- The Request Status will change from Pending to **Assigned**.
- The Assignment circle on the timeline will display a full blue circle with the check marking complete.
- If the assigned RDS worker field and or the request Status does not update immediately, click on **Refresh** from the action toolbar.

Section 2: Resource Development Specialists: How to retrieve and complete the placement request.

Step 1: Navigate to the **Placement RDS Dashboard** within the Placement Request Work Area.

Step 2: Select the **Placement Request**.

Step 3: Review details of the placement request, then click on **Find Placement**.

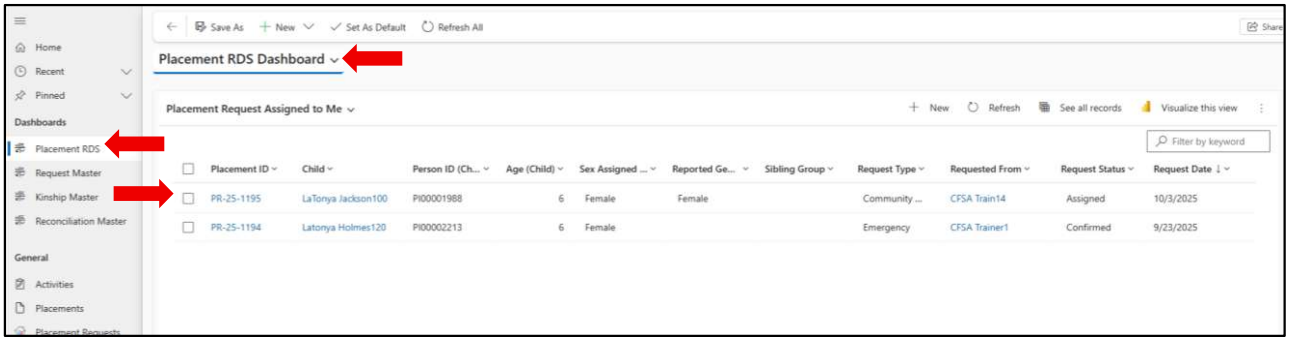

Figure 5

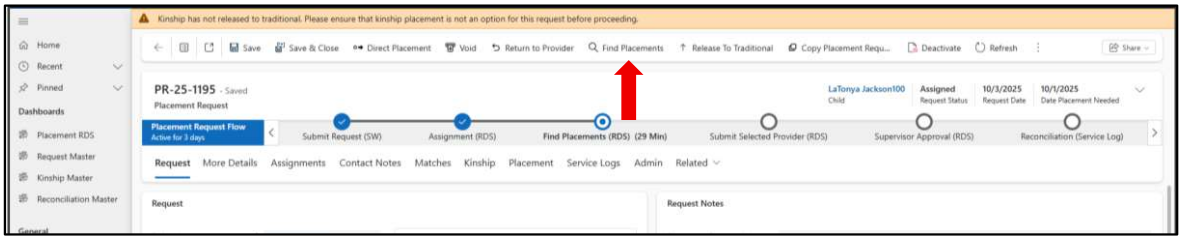

Figure 6

Step 4: Click **Yes** to message. Once selected the Status will change to Match Pending.

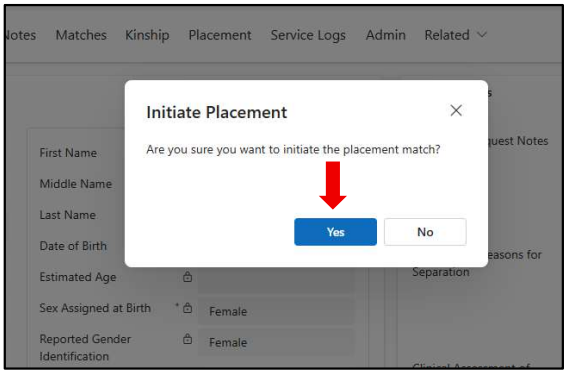

Figure 7

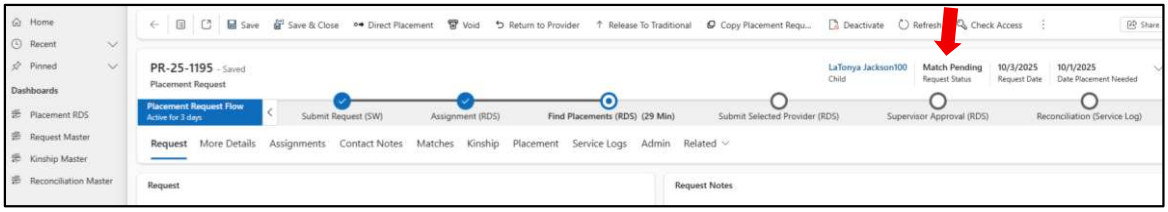

Figure 8

Step 5: Click on the **Matches** tab. Identified matches for the placement will populate within the Placement Matches Subgrid.

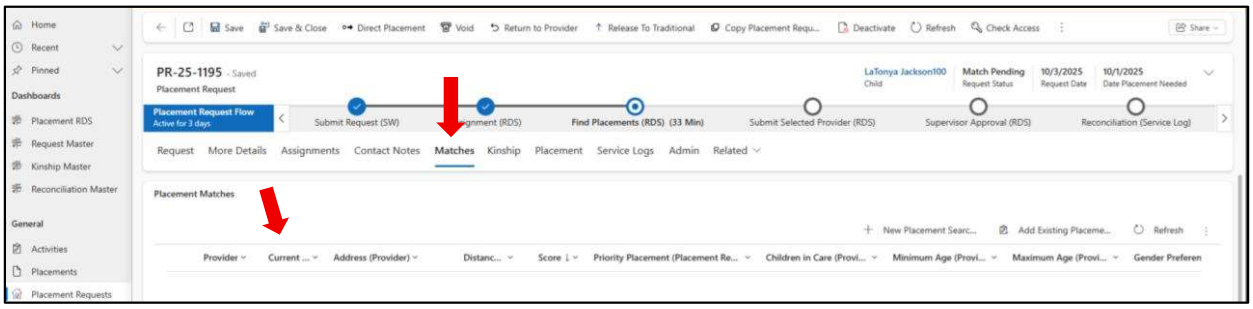

Figure 9

Note:

- All providers that are licensed and available will populate in the Placement Matches subgrid with a match score descending from highest to lowest. The highest scores represent providers with the best potential match for the child.
- Identified matches for the placements missing assessment and questionnaire data will populate within the Providers Missing Questionnaire subgrid. (*See Figure 10*).
- The RDS worker can select multiple providers within the Placement Matches subgri to botify them of a potential placement match.
- Potential matches can receive text notifications, calls, and/or emails.

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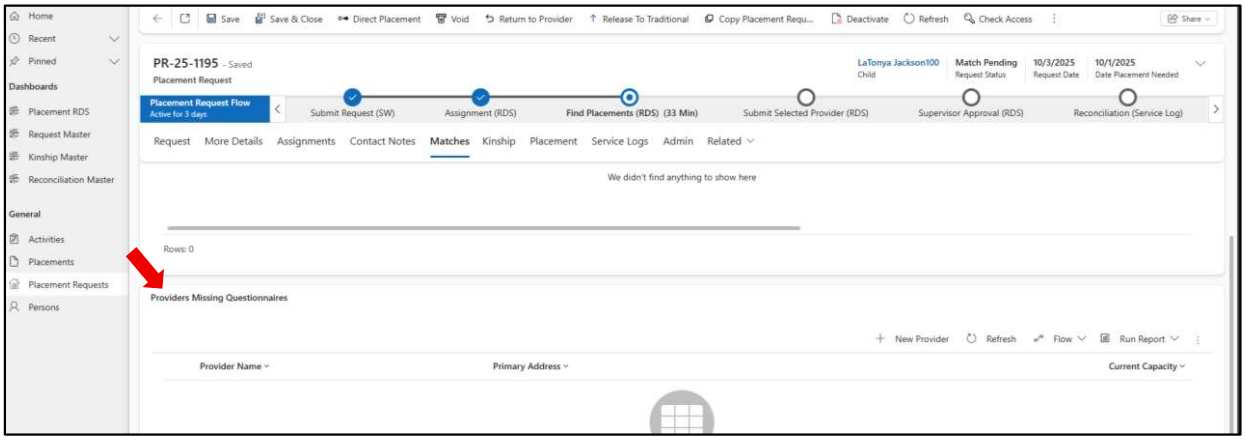

Figure 10

Step 6: Select the **Provider(s)** within the **Placement Matches** subgrid.

Step 7: Click **Notify**. This will notify potential matches that CFSA is in search of a placement for a child. The potential matches will have an opportunity to respond.

Step 8: Click **Ok**.

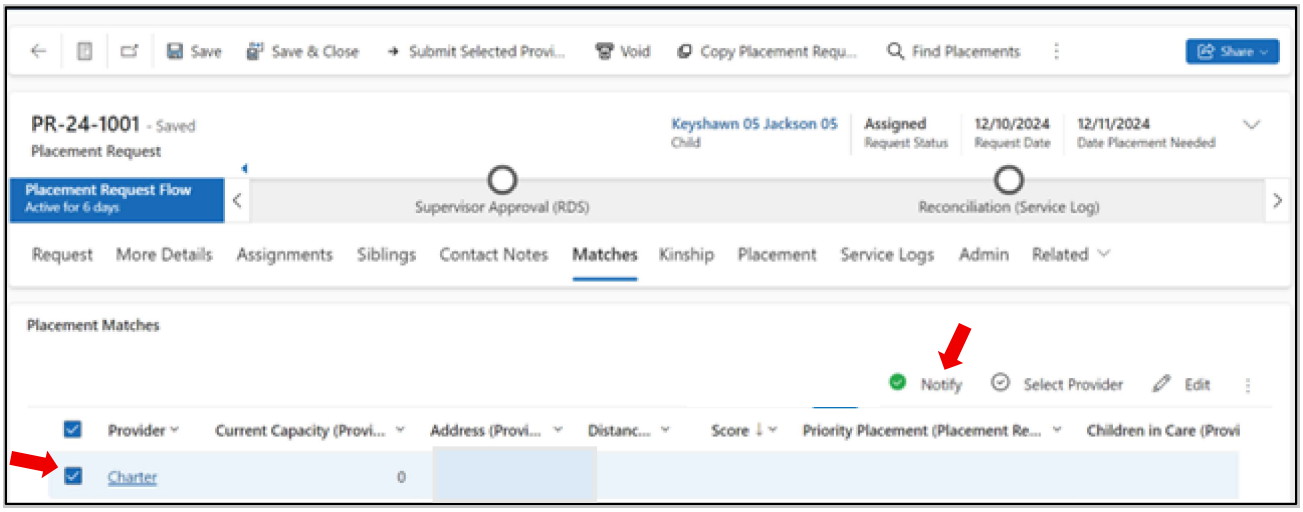

Figure 11

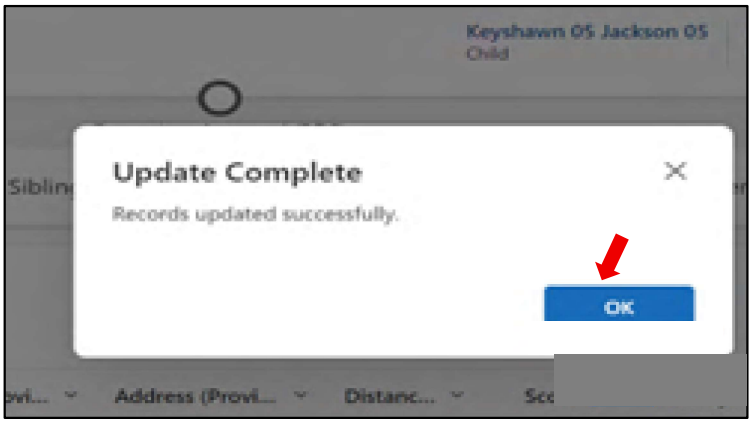

Figure 12

Step 9: Click **Select Provider** from Placement Matches subgrid.

Step 10: Click **Yes** to confirm **Provider**, then click **OK**.

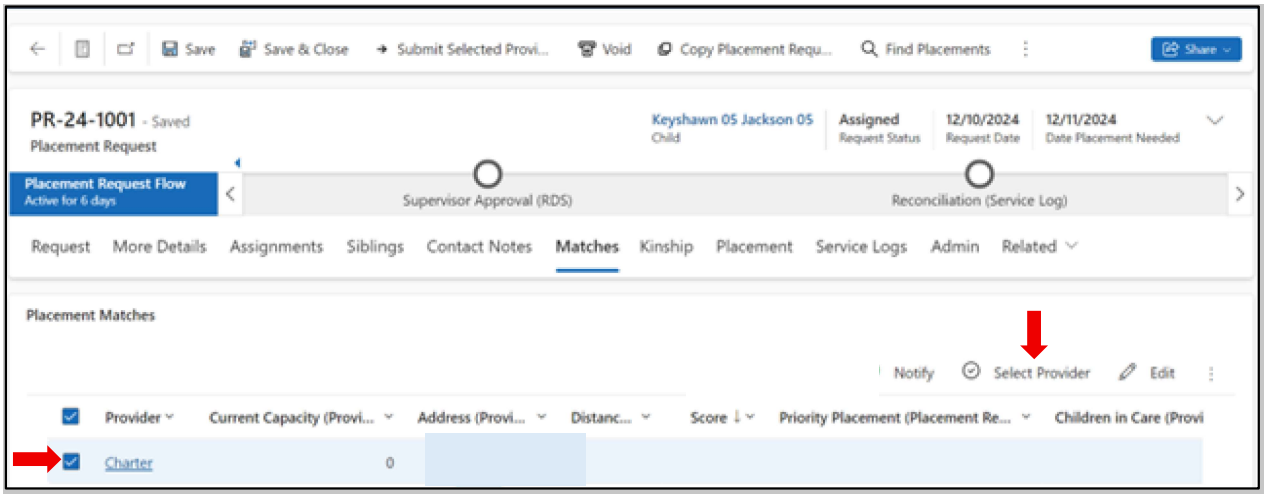

Figure 13

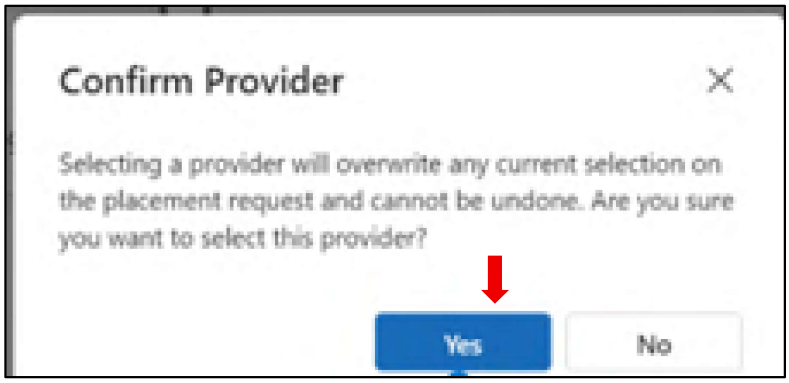

Figure 14

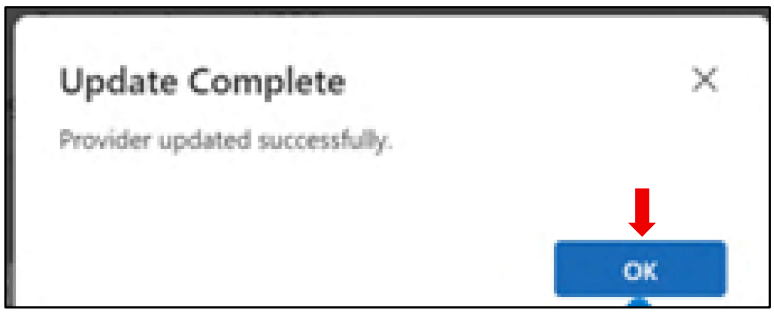

Figure 15

Note: If the Provider doesn't show in the subgrid, workers can complete a Search to locate a provider. The following steps will include this process.

Step 11: Click +New Placement Seach to locate more providers.

Step 12: Select Provider.

Step 13: Click **Save and Close**. The Providers information will display in the Placement Matches subgrid.

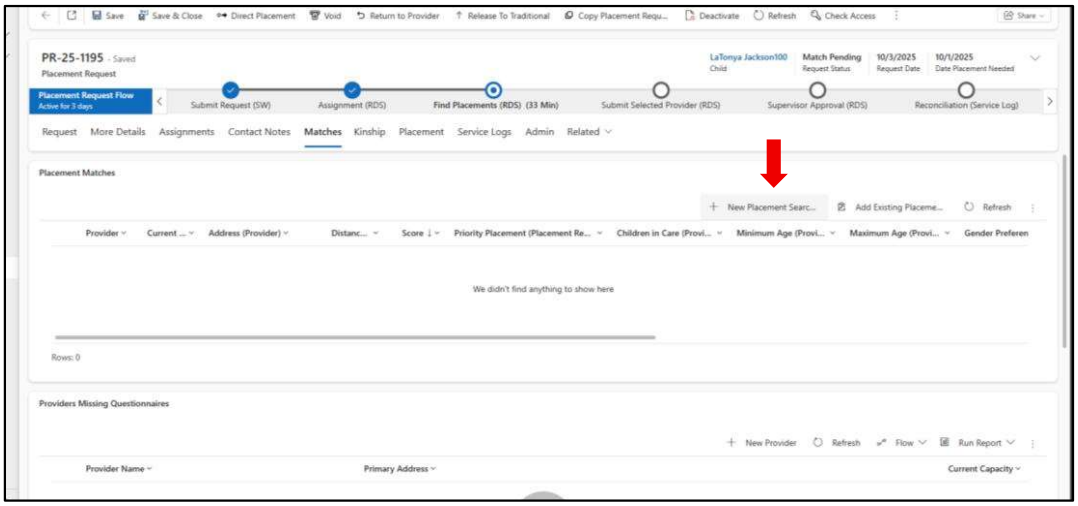

Figure 16

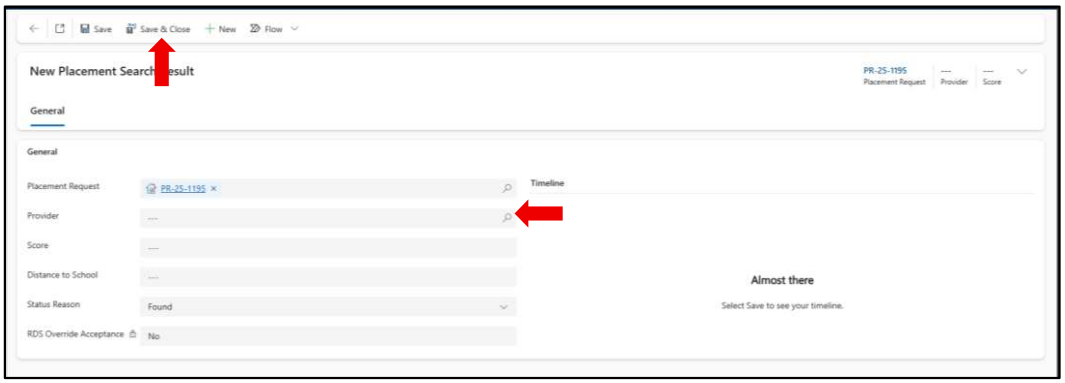

Figure 17

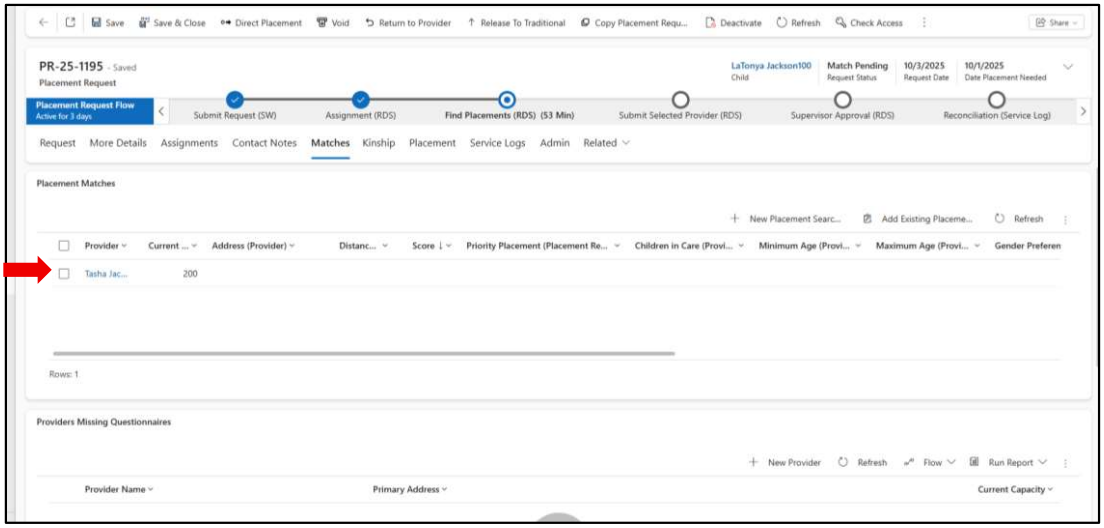

Figure 18

Step 14: Click **Select Provider**.

Step 15: Select **Yes** to Confirm Provider.

Step 16: Select **Yes**.

Step 17: Select **OK**. The request status will change to **Pending Approval**.

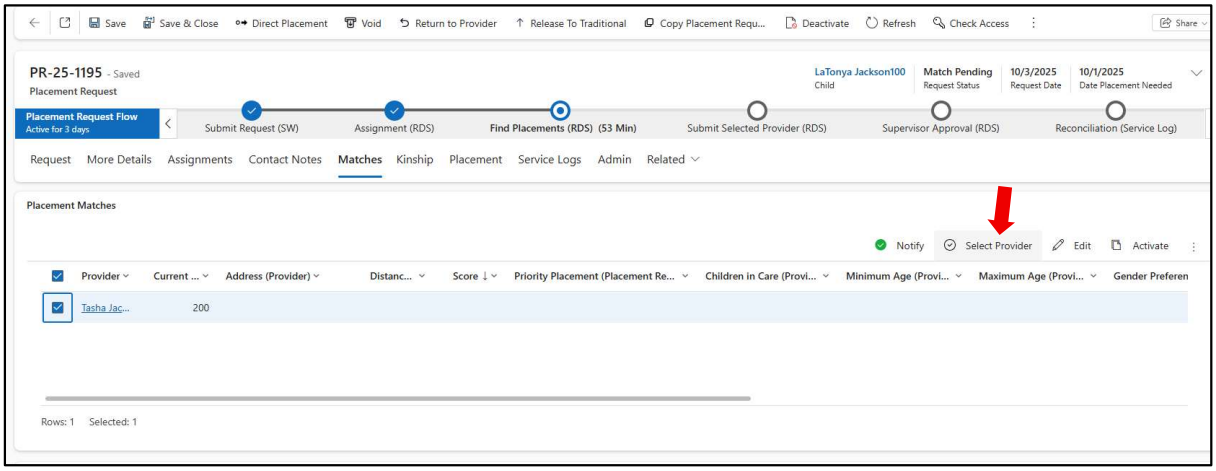

Figure 19

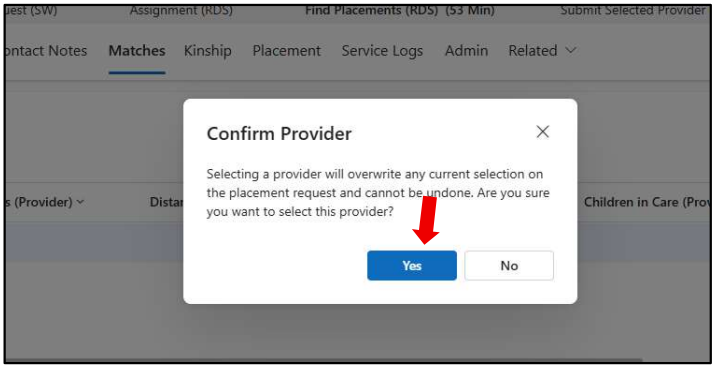

Figure 20

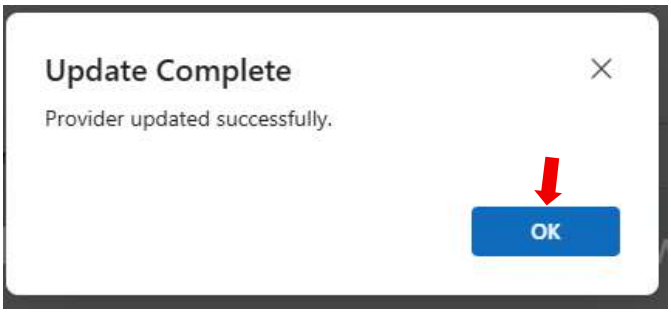

Figure 21

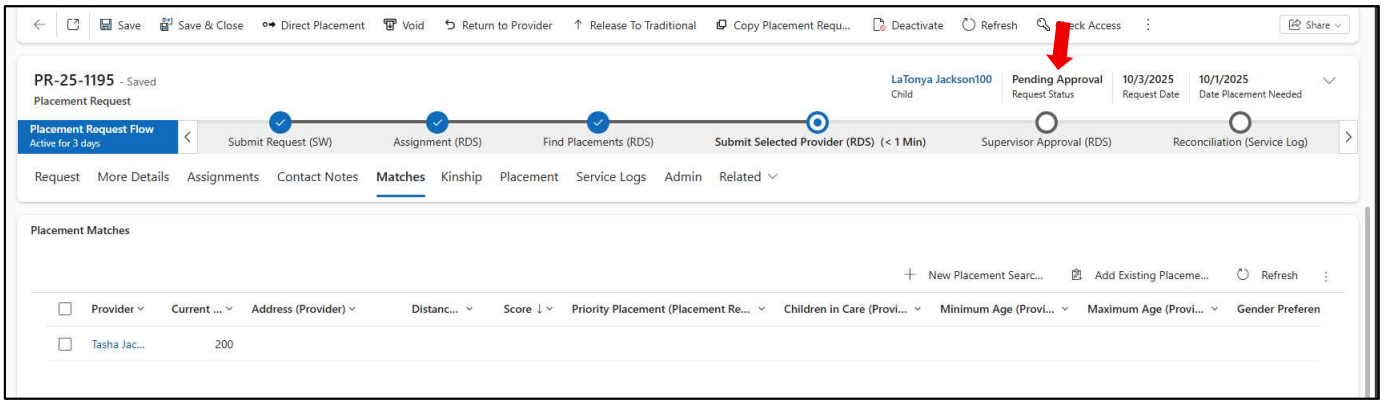

Figure 22

Section 3: How to Approve the Placement Match on a Placement Request

Step 1: Navigate to the Placement Request Master Dashboard page within the Placement Work Area. Then select and open the **placement request** pending approval within the **Pending Approval** subgrid.

Step 2: Click on the **Admin** tab.

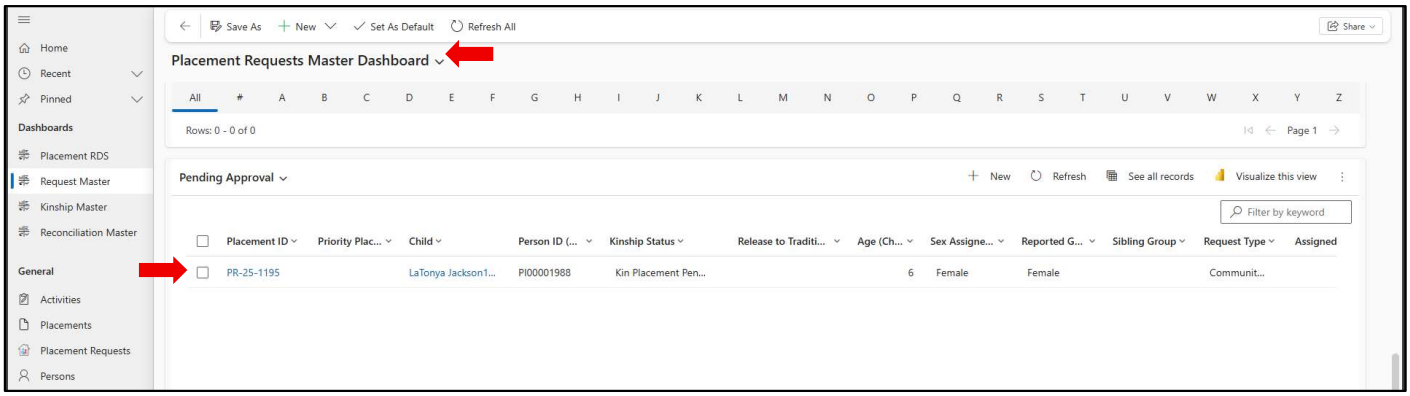

Figure 23

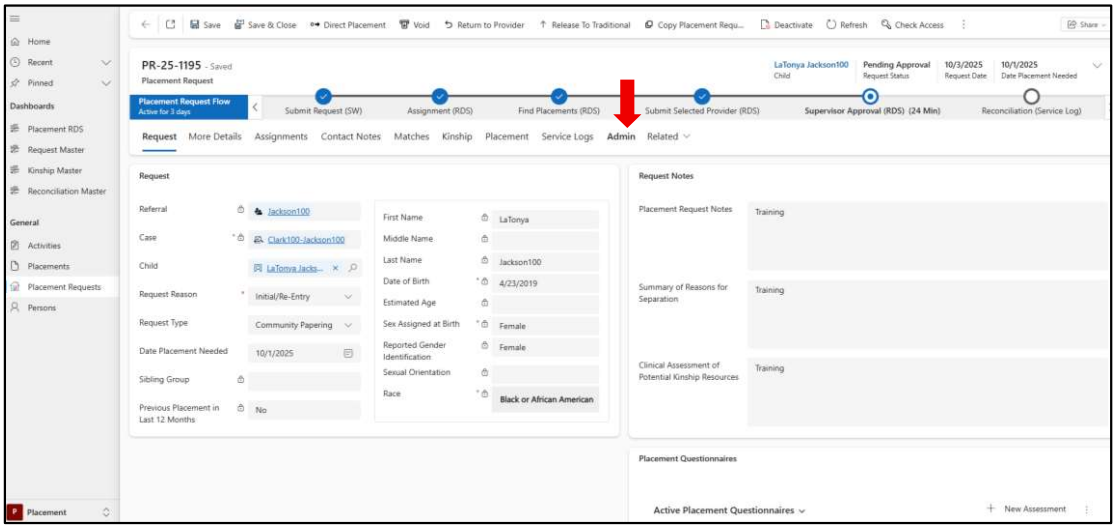

Figure 24

Step 3: Double Click on the **Approval Request** within the Approvals subgrid.

Step 4: Review request, then click **Approve**. The request status will change to Supervisor Approved.

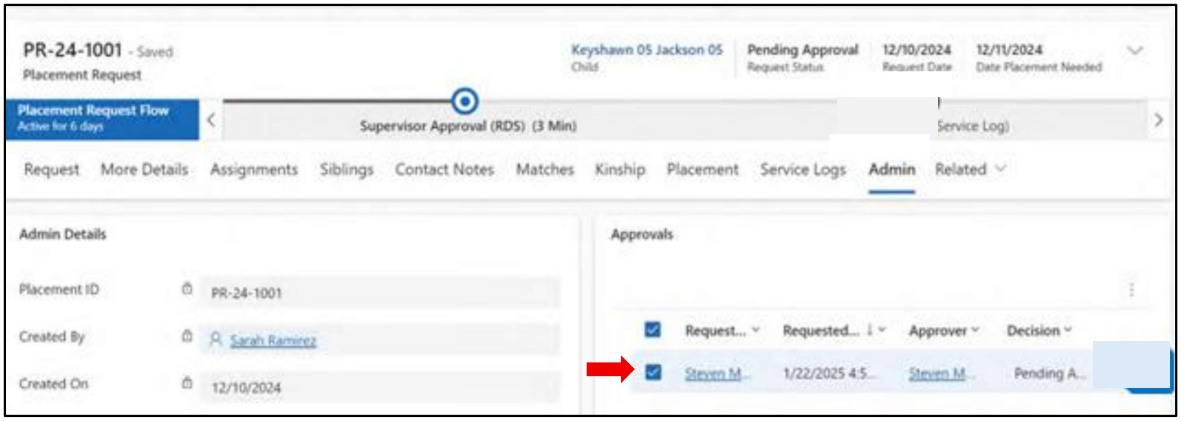

Figure 25

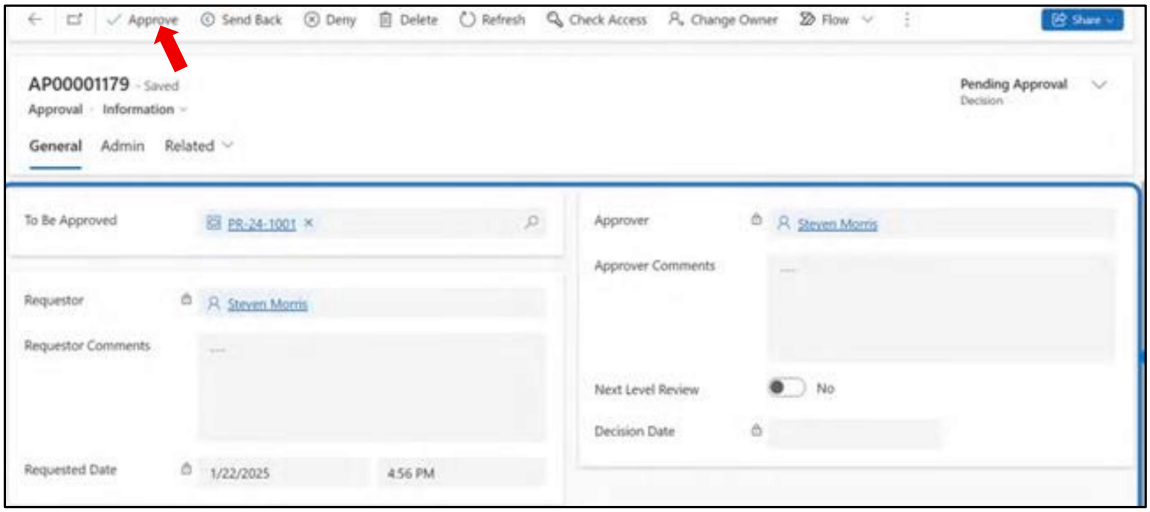

Figure 26

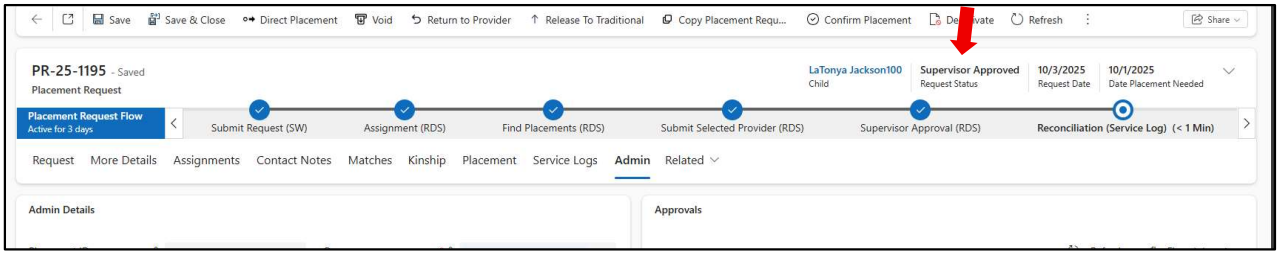

Figure 27

Note:

- The Supervisor can also return or deny the match if needed. If denied, the match selection will become editable, allowing the RDS worker to choose an alternate provider.

Section 4: How to Confirm a Placement

Once a child has been placed with the Provider, the placement must be confirmed.

Step 1: Navigate to the Placement Record, then click **Confirm Placement** at the top of the screen. The system will then require a Confirmation Date to be entered.

Step 2: Enter **Confirmation Date**.

Step 3: Click **Confirm Placement**.

Step 4: Click **OK** to Confirm Placement. The status will change to "Confirmed".

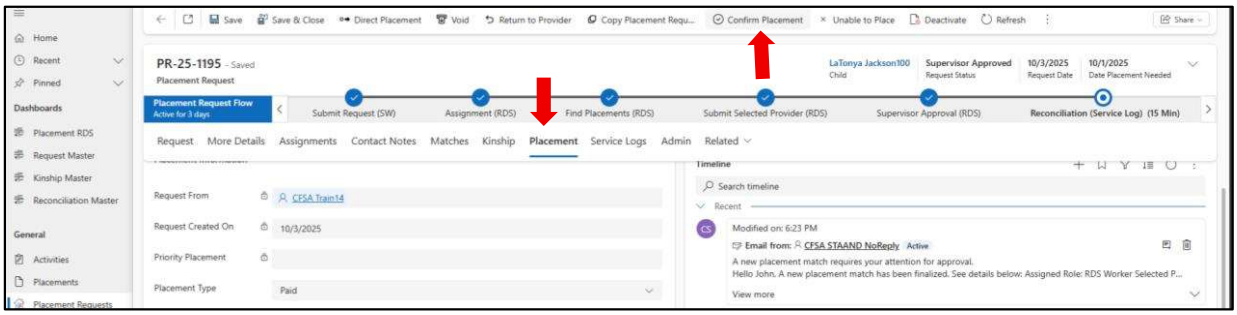

Figure 28

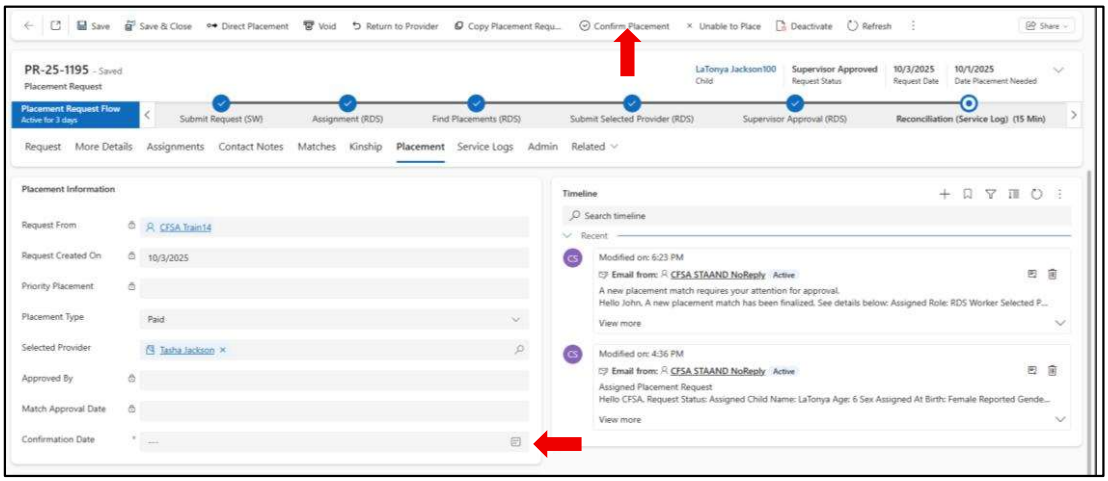

Figure 29

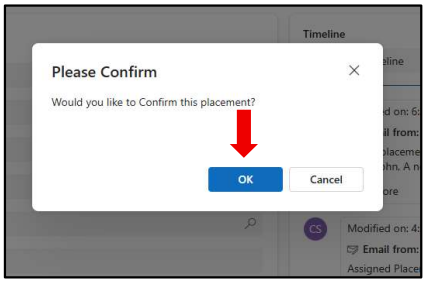

Figure 30

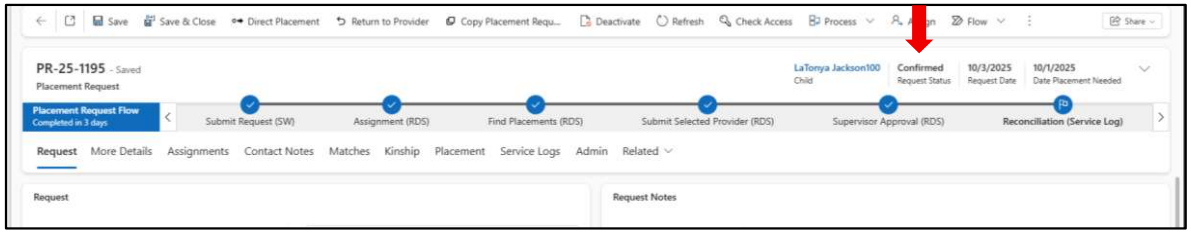

Figure 31

Note:

- When the confirmation date is entered on the placement tab, it may not populate to the service log. If it does not populate, access the service log and enter the confirmation date in that section.

Section 5: How to Reconcile a Placement Request (Service Log)

Step 1: Navigate to the Reconciliation Master Dashboard within the Placement Work Area.

Step 2: Select and open the placement record needing to be reconciled within the Confirmed Placements - Pending Reconciliation subgrid.

Step 3: Click on the **Service Log** tab, then select the service log.

Step 4: Click **OK**.

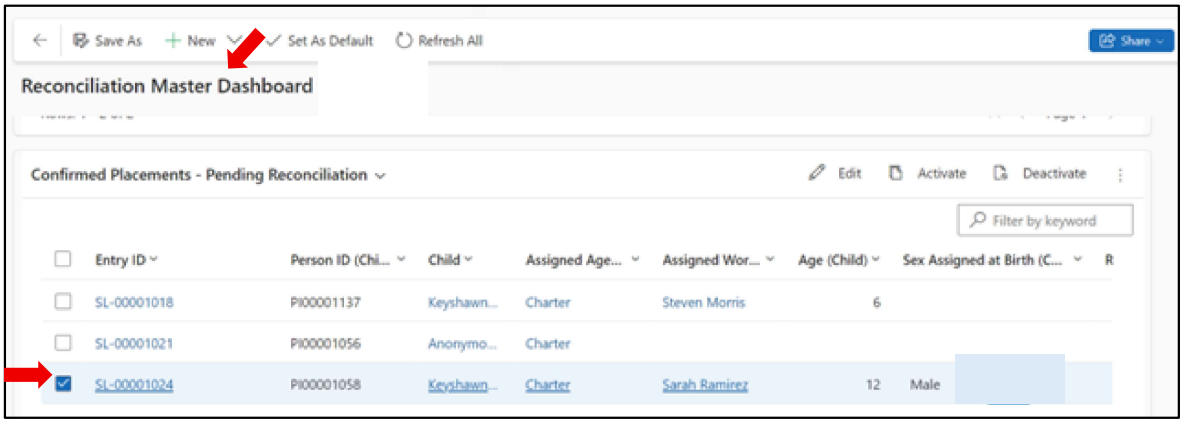

Figure 32

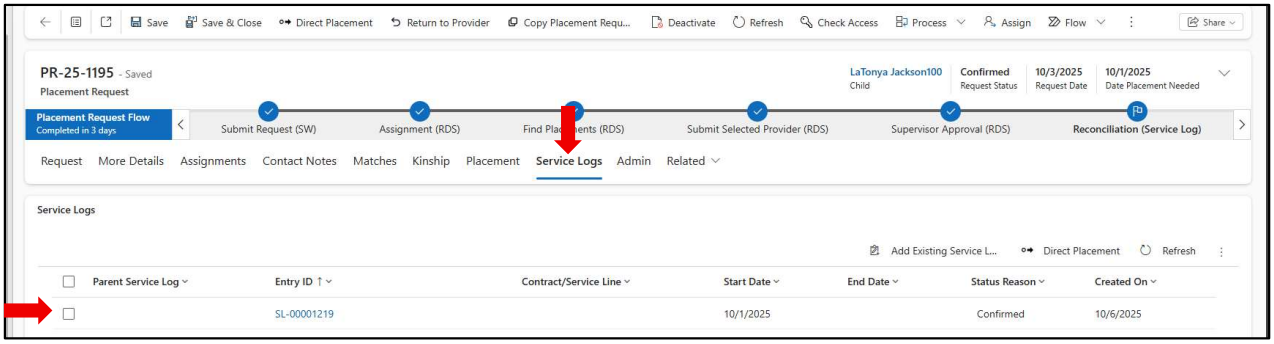

Figure 33

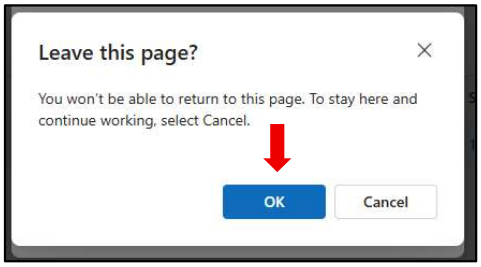

Figure 34

Step 5: Enter **Contract/Service Line** and **Effective Start Date**.

Step 6: Click **Save and Close**.

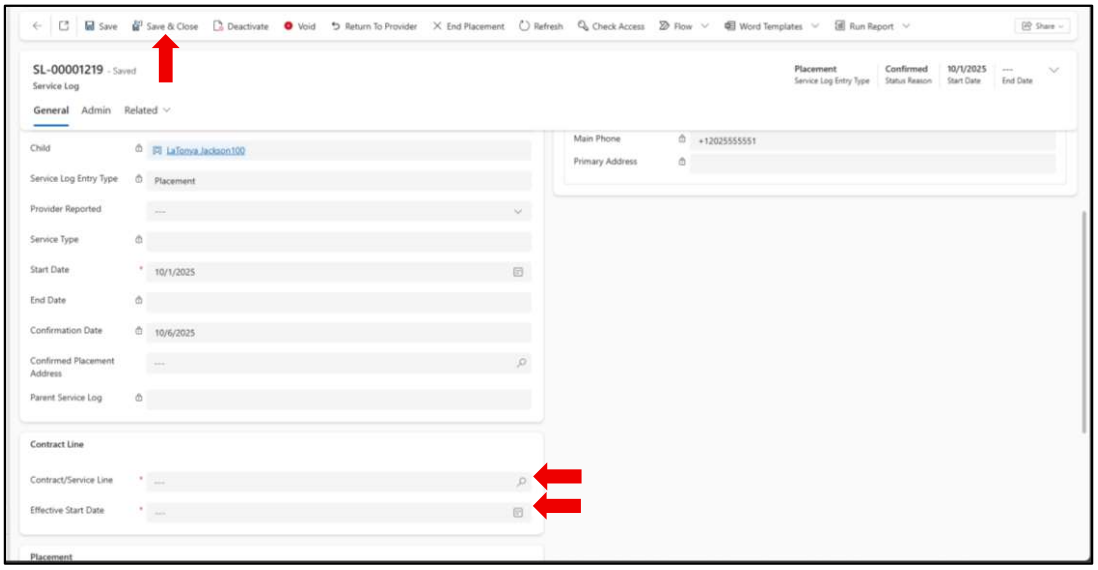

Figure 35

Section 6: How to End a Placement Request

Note:

- The pre-requisite to ending a placement is having a new placement.
- Placements are automatically ended when case closures and person closures occur.

Step 1: Navigate to the **Service Log** within the Placement Request.

Step 2: Click **End Placement** on the top ribbon.

Step 3: Complete the **End Placement** section.

Step 4: Click **Save & Close**.

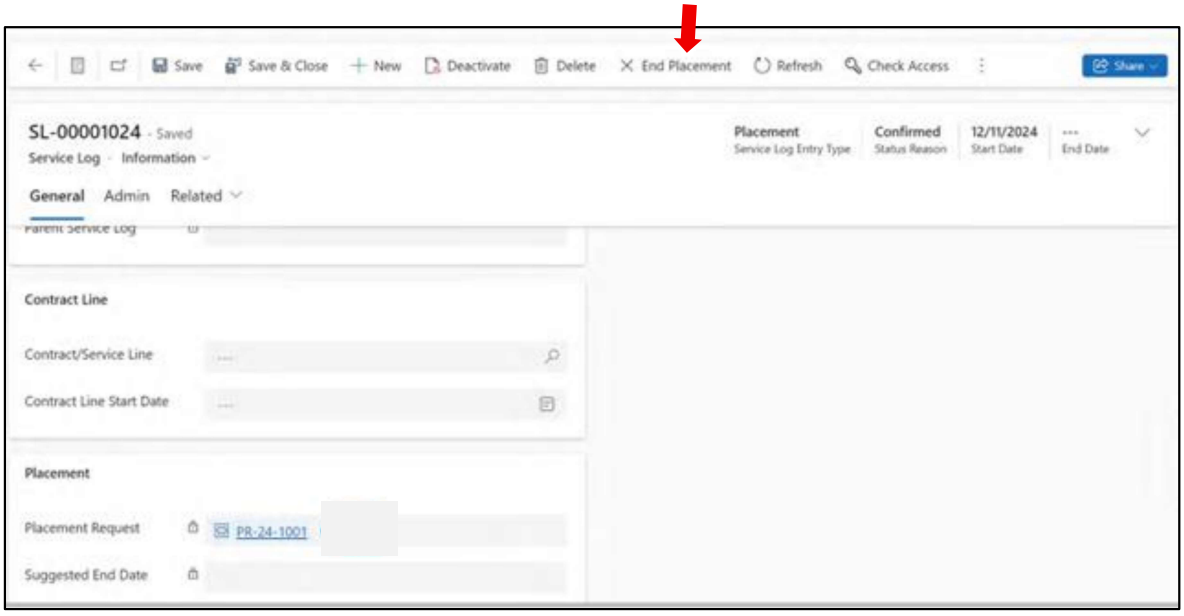

Figure 36

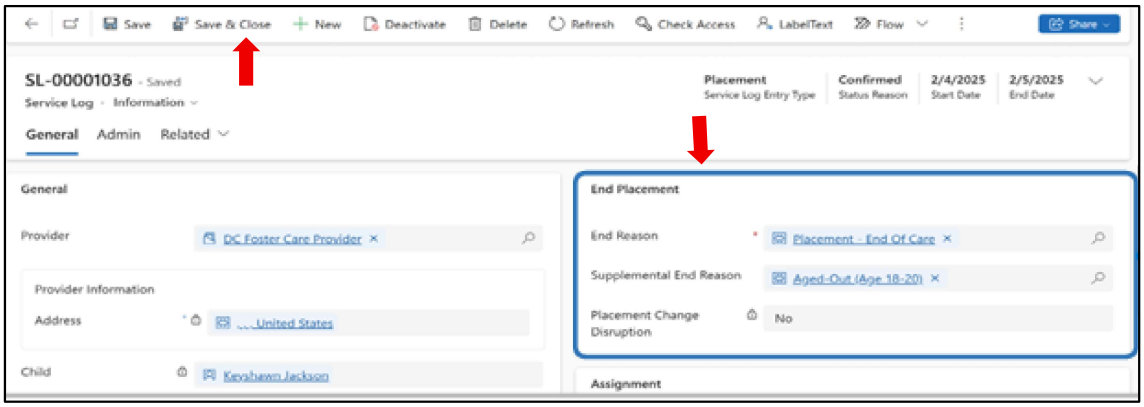

Figure 37