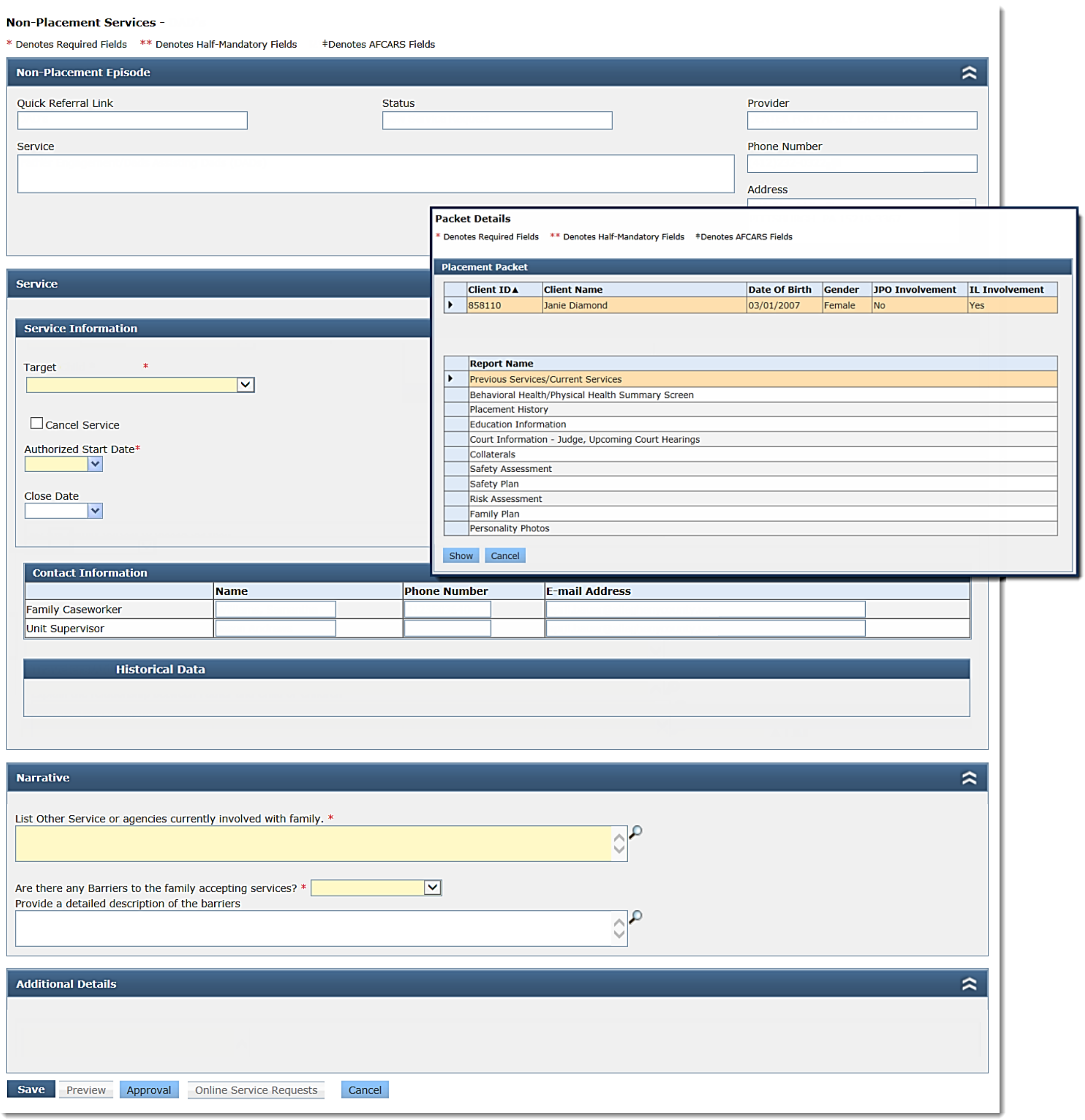
Non-Placement Services Referral & Packet Details – Provider Job Aid

The *Non-Placement Services Referral* provides information on the child(ren) and family that have been referred for services. This information includes the reasons for the Posting/Referral, case history, services currently provided, expected outcomes of this referral, as well as other referral specific information. The *Packet Details* screen provides detailed information on the clients including assessments and plans.

Non-Placement Services Referral and Packet Details



Non-Placement Services -

* Denotes Required Fields ** Denotes Half-Mandatory Fields ‡Denotes AFCARS Fields

Non-Placement Episode

Quick Referral Link
Status
Provider
Service
Phone Number
Address

Service

Service Information

Target *

Cancel Service

Authorized Start Date*

Close Date

Contact Information

	Name	Phone Number	E-mail Address
Family Caseworker			
Unit Supervisor			

Historical Data

Narrative

List Other Service or agencies currently involved with family. *

Are there any Barriers to the family accepting services? *

Provide a detailed description of the barriers

Additional Details

Save | Preview | Approval | Online Service Requests | Cancel

Packet Details

* Denotes Required Fields ** Denotes Half-Mandatory Fields ‡Denotes AFCARS Fields

Placement Packet

Client ID▲	Client Name	Date Of Birth	Gender	JPO Involvement	IL Involvement
858110	Janie Diamond	03/01/2007	Female	No	Yes

Report Name
Previous Services/Current Services
Behavioral Health/Physical Health Summary Screen
Placement History
Education Information
Court Information - Judge, Upcoming Court Hearings
Collaterals
Safety Assessment
Safety Plan
Risk Assessment
Family Plan
Personality Photos

Show | Cancel

Navigating to the Referral

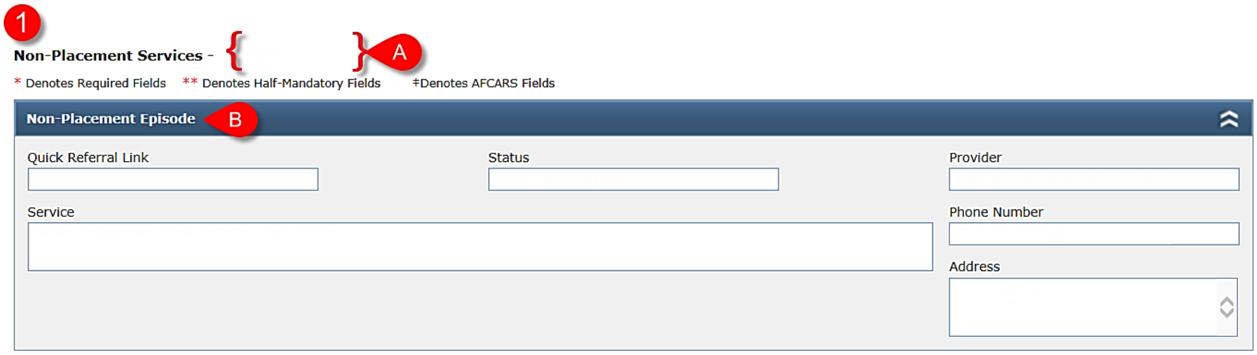
1. To view the Referral for an Online Posting navigate to the *Pending Online Service Requests* Screen.
   a. Under the *Organizer* tab in the Left Navigation Pane under **My Tasks** click on the ⊞ next to **Online Service Requests**
   b. Click on the Pending Online Service Requests hyperlink.
   c. Click on the **NonPlacement** tab.
   d. Click on the desired Posting in the *Cases* grid and click the Show button at the bottom of the screen.
2. To view the Referral for a case that is assigned to you or your agency navigate to *My Active Services*.
   a. Under the *Organizer* tab in the Left Navigation Pane under **Workload** click on **My Active Services**
   b. Click on the **NonPlacement** tab.
   c. Click on the desired Case in the *Cases* grid and click the Show button at the bottom of the screen.

Reviewing the Referral

1. Reviewing the Referral: The referral screen will display a unique set of sections and fields specific to the type of referral (*Quick Referral)* that has been made. There are several types of Non-Placement Services Referrals (*Quick Referrals*):
   Caseworker Direct/Service Selection, Crisis, Online, and Independent Living.
2. There are some common sections and fields that will be present in most of the referrals. In each referral there are sections which can be minimized or maximized by using the chevrons that appear in the right hand corner of each section: ⌃ ⌄. The referral is a read-only screen for providers.
   a. Clicking Preview will bring up a printable version of the referral.
   b. Clicking Cancel will navigate the user to the *Non-Placement Services List* screen.

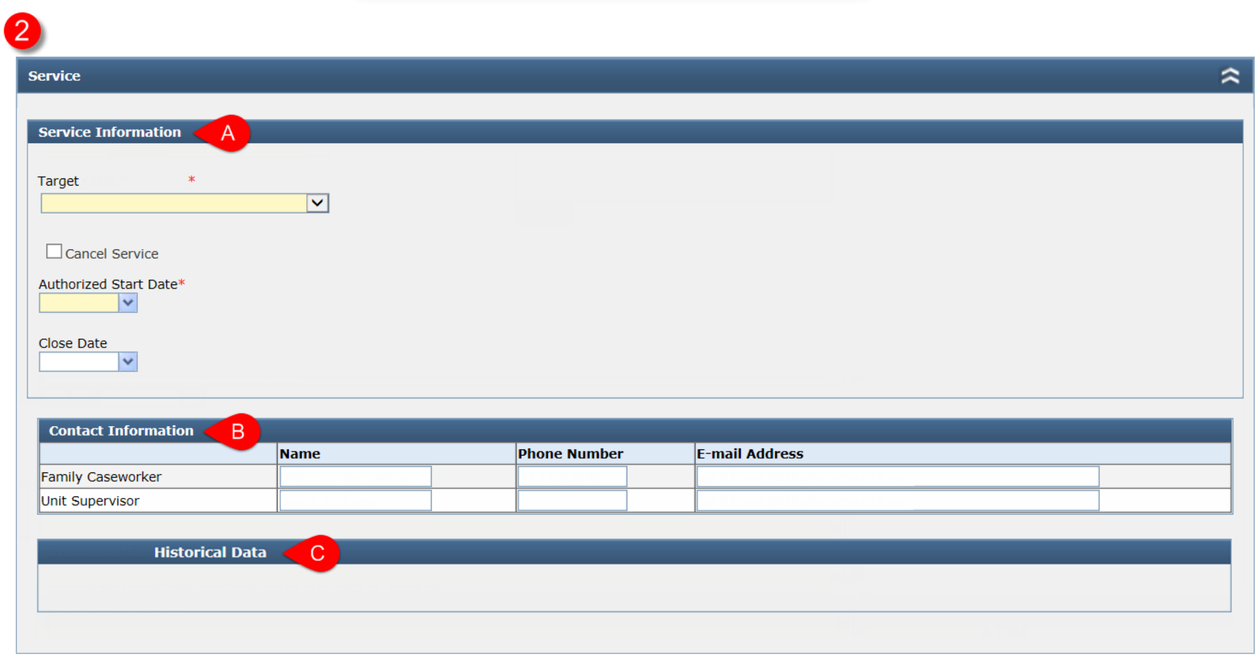
***Tip:** The next section of this Job Aid will review all of the common fields that may be found on the Non-Placement Referral screen. To go directly to a review of the **Packet Details** screen go to Page 7 of this Job Aid.*

Common Fields and Sections in Referrals

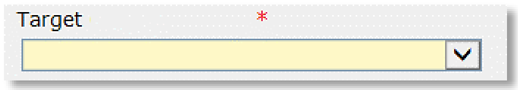


1. All referrals will include the *Quick Referral* name.
    a. The name of the *Quick Referral* will appear here.
    b. The *Non-Placement Episode* section contains the following information:
        i. *Quick Referral Link*: Name of the type of Non-Placement Services referral.
        ii. *Status*: Authorization status (Example: New Service Request, Service Authorized,…)
        iii. *Service*: Contracted service listing (Service String) for the Referral
        iv. *Provider*: Name of the selected provider
        v. *Phone Number*: Selected provider's phone number
        vi. *Address*: Selected provider's address

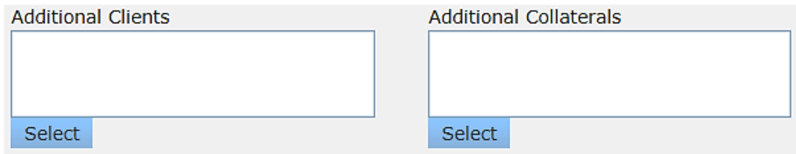
> ***Note:*** *Provider, Phone Number and Address will be blank in Online referrals until a provider has been chosen by CYF for that Online referral posting.*



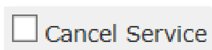
2. The *Service* section is highly customized but will contain some common elements.
    a. *Service Information* sub-section – common elements that this section may include:
        i. The name of the *Target Client, Target Child, or Target Adult*:



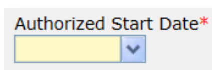
        ii. *Additional Clients* and/or *Additional Collaterals* to be served:



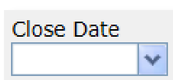
        iii. *Cancel Service* checkbox: Services cannot be canceled once the provider has begun providing services and documented Service Logs for the referral.



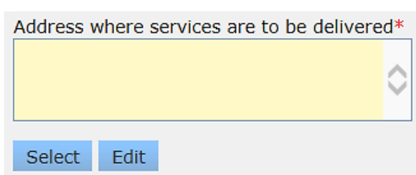
        iv. *Authorized Start Date:* The date when the provider can begin services. Providers will not be able to document before this date.



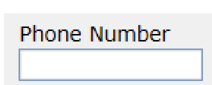
        v. *Close Date:* The date that services have ended. Providers can continue to enter documentation and view the referral in KIDS up to 10 days following the *Close Date*.



        vi. *Address where services are to be delivered:*



        vii. *Phone Number:* The phone number of the *Target Child/Adult/Client* receiving services.



viii. *Has the family agreed to accept service?*: Indicates whether or not the family has agreed to services.

Has the Family agreed to accept service?

ix. *Reason for Service* text box: The referring agency will document the reason that services have been referred here.

Reason for Service (include a synopsis of family situation if applicable)*

x. *Court Ordered* checkbox and *Court Ordered Comments* textbox: If the Service has been court ordered the *Court Ordered* checkbox will be checked ☑. *Court Ordered Comments* provide further detail about the court order.

☐ Court Ordered

Court Ordered Comments

b. The *Contact Information* sub-section includes the *Name*, *Phone Number* and *E-mail Address* for the *Family Caseworker* and *Unit Supervisor* who hold family assignment on the case.

Contact Information

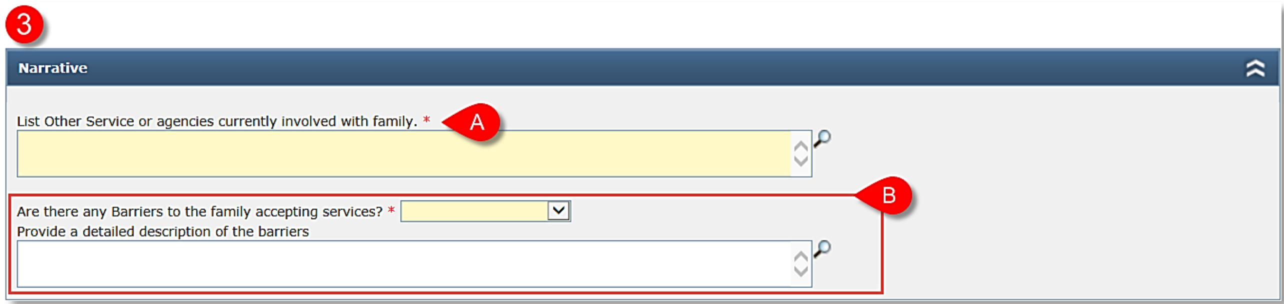
	Name	Phone Number	E-mail Address
Family Caseworker			
Unit Supervisor			

c. The *Historical Data* sub-section may appear on older referrals and will display information entered in sections that are no longer used in the new Referral formats implemented on 3/31/16.
Example:

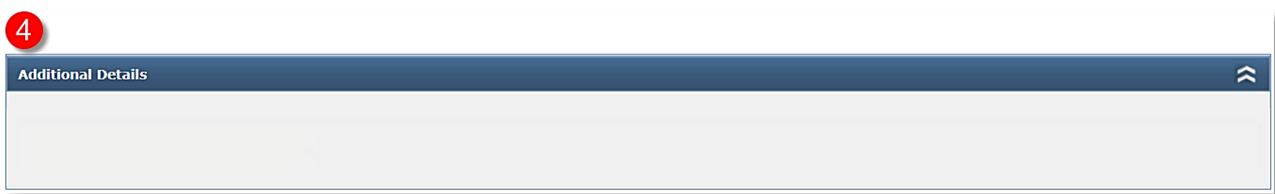
Travelers Aid Historical Data

Travelers Aid Type	Need for Card	Person/s accompanying client on trip/s
Gas Card	Visits with children.	The child's 4 siblings and 4 cousins will be accompanying Mother.

Date	Code	No.Rides	From	To	No.Adults	No.Children
11/16/2010	A - Parent Visit	7	123 First St., Pittsburgh, PA 15214	456 Second St. Pittsburgh, PA 15215	5	5

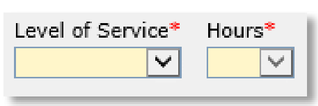


3. The *Narrative* section:
    a. *List Other Service or agencies currently involved with the family.* textbox: Open placement and non-placement services for the target client will automatically be entered in this textbox. The referring agency may also list additional services here.
    b. *Are there any Barriers to the family accepting service?* drop-down and textbox: If *Yes* is selected the barriers textbox will contain a description of the barriers.



4. The *Additional Details* section is a dynamic section that captures any additional information needed for the specific *Quick Referral*. For example: Housing Assistance referrals will include information on income and the type of assistance needed in this section.

5. Some referrals may also contain *Level of Service* and *Hours*. These indicate the level of service and number of hours initially authorized for this referral.



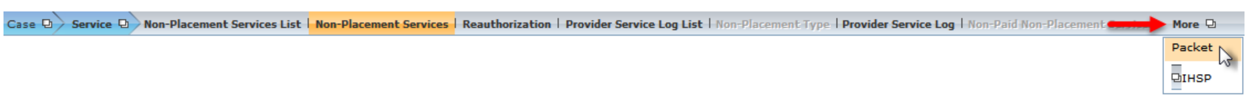
6. The buttons at the bottom of the screen perform the following functions:
    a. Clicking Preview will bring up a printable version of the referral.
    b. Clicking **Online Service Requests** will navigate the user to the *Online Service Request* screen.
    c. Clicking Cancel will navigate the user to the *Non-Placement Services List* screen for the specific case in focus.

Navigating to the Packet Details screen

1. To view the *Packet Details* screen for an Online Posting navigate to the *Pending Online Service Requests* Screen.
    a. Under the *Organizer* tab in the Left Navigation Pane under **My Tasks** click on the + next to **Online Service Requests**
    b. Click on the Pending Online Service Requests hyperlink.
    c. Click on the NonPlacement tab.
    d. Click on the desired Posting in the *Cases* grid and click the Show button at the bottom of the screen to bring the case and target client into focus.
    e. Navigate to **Case > Service > Packet**.

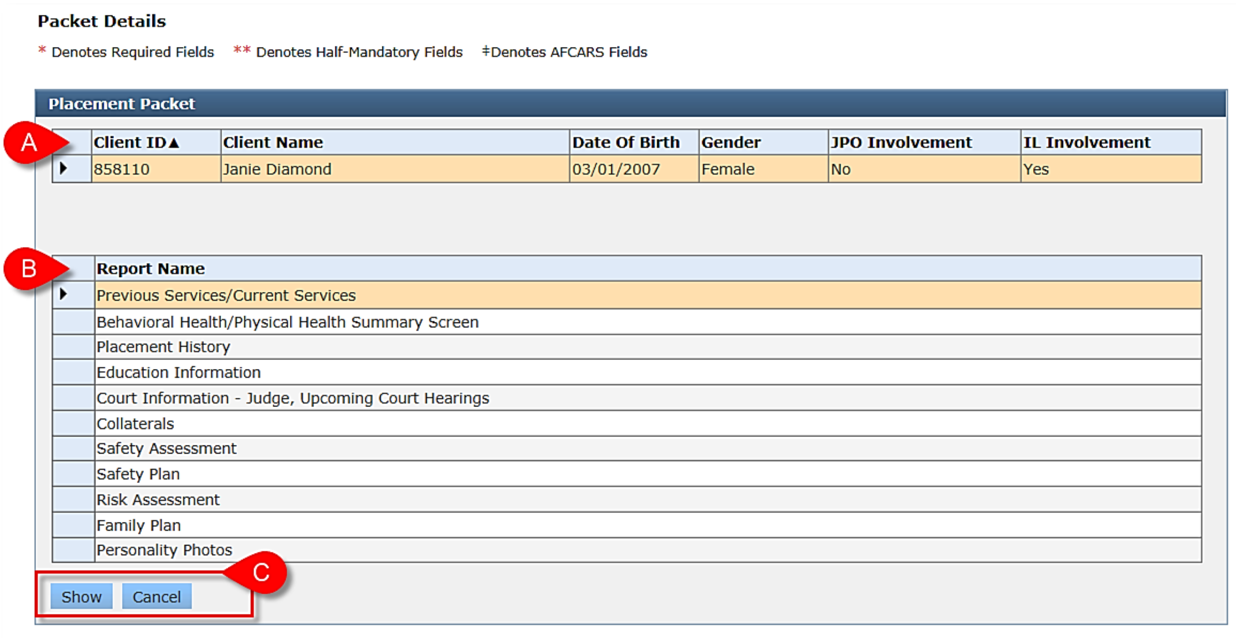
2. To view the Referral for a case that is assigned to you or your agency navigate to *My Active Services*.
    a. Under the *Organizer* tab in the Left Navigation Pane under **Workload** click on **My Active Services**
    b. Click on the NonPlacement tab.
    c. Click on the desired Case in the *Cases* grid and click the Show button at the bottom of the screen to bring the case and target client into focus.
    d. Navigate to **Case > Service > Packet**.

3. Navigating from the *Non-Placement Services* screen using the Breadcrumb trail: **More > Packet**



***Tip:** The Packet Details screen will continue to update with the latest information entered in KIDS for the client(s). It will also continue to update with any new approved assessments, plans, placements and services.*

Using the Packet Details screen



Packet Details

* Denotes Required Fields ** Denotes Half-Mandatory Fields ‡Denotes AFCARS Fields

Placement Packet

A

	Client ID▲	Client Name	Date Of Birth	Gender	JPO Involvement	IL Involvement
▶	858110	Janie Diamond	03/01/2007	Female	No	Yes

B

	Report Name
▶	Previous Services/Current Services
	Behavioral Health/Physical Health Summary Screen
	Placement History
	Education Information
	Court Information - Judge, Upcoming Court Hearings
	Collaterals
	Safety Assessment
	Safety Plan
	Risk Assessment
	Family Plan
	Personality Photos

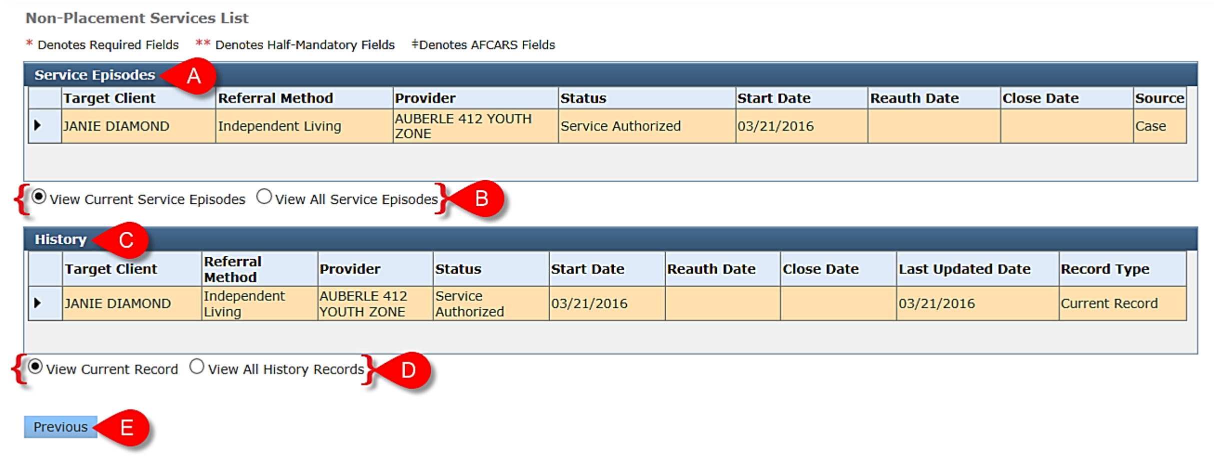
C

Show Cancel

1. Using the *Packet Details* screen:
   a. The Client grid will display the target and additional clients identified for this referral. This grid includes some basic information on the client: *Client ID, Client Name, Date of Birth, Gender, JPO Involvement* and *IL Involvement*.
   Click on the client's name in the grid to view the reports for that client.
   b. Select a report from the *Report Name* grid.
   c. Click Show . This will either navigate to the selected report's list screen or display a printable pop up with the selected report's information.
   Clicking Cancel will navigate the user back to the **Case > Service** splash screen.
      i. Reports with list screens will contain a Previous button on their list screen. Clicking Previous will navigate the user back to the *Packet Details* screen.
         a. Some list screens will also have a Preview button that will open a PDF of the selected item in a new window.

Packet Details screen - Reports

1. *Previous Services/Current Services*: Highlight the *Previous Services/Current Services* report in the grid and click Show. The Packet - *Non-Placement Services List* screen will appear.



Non-Placement Services List

* Denotes Required Fields ** Denotes Half-Mandatory Fields ‡Denotes AFCARS Fields

Service Episodes A

	Target Client	Referral Method	Provider	Status	Start Date	Reauth Date	Close Date	Source
▶	JANIE DIAMOND	Independent Living	AUBERLE 412 YOUTH ZONE	Service Authorized	03/21/2016			Case

View Current Service Episodes View All Service Episodes B

History C

	Target Client	Referral Method	Provider	Status	Start Date	Reauth Date	Close Date	Last Updated Date	Record Type
▶	JANIE DIAMOND	Independent Living	AUBERLE 412 YOUTH ZONE	Service Authorized	03/21/2016			03/21/2016	Current Record

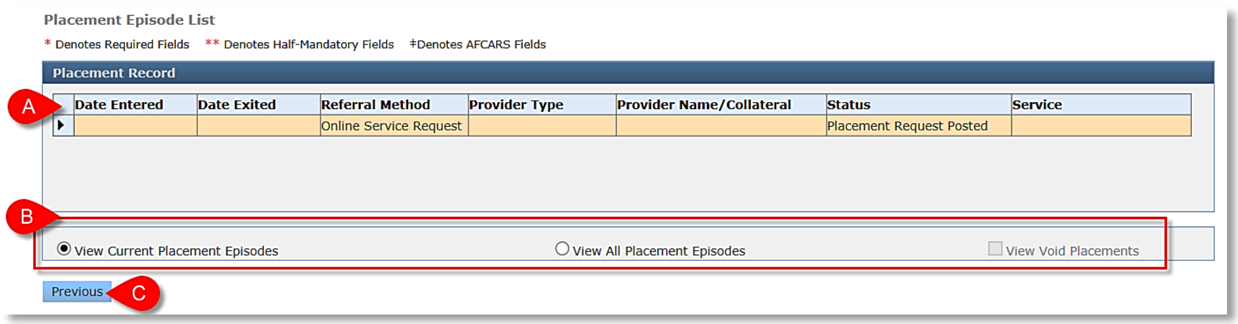
View Current Record View All History Records D

Previous E

a. The *Service Episodes* grid includes the following information: *Target Client, Referral Method* (Example: Online Service Request, CYF Caseworker Direct Referral), *Provider*, *Status* of the referral, *Start Date*, *Reauth Date, Close Date*, and *Source* of the referral (Case or Investigation).
b. The *Service Episodes* grid defaults to displaying services that are Current (Open). Select the *View All Service Episodes* radio button to view the full list including closed services.
c. The *History* grid contains a list of current and historical records for the *Service Episode* highlighted in the *Service Episode* grid. The *History* grid includes the following information: *Target Client, Referral Method* (Example: Online Service Request, CYF Caseworker Direct Referral), *Provider*, *Status* of the referral, *Start Date*, *Reauth Date, Close Date*, and *Source* of the referral (Case or Investigation), *Last Updated Date* of the record, and *Record Type* (Current or Historical).
d. The *History* grid defaults to displaying the Current Record. Select the *View All History Records* radio button to see the full list of records including all historical records.
e. To navigate back to the *Packet Details* screen click Previous.

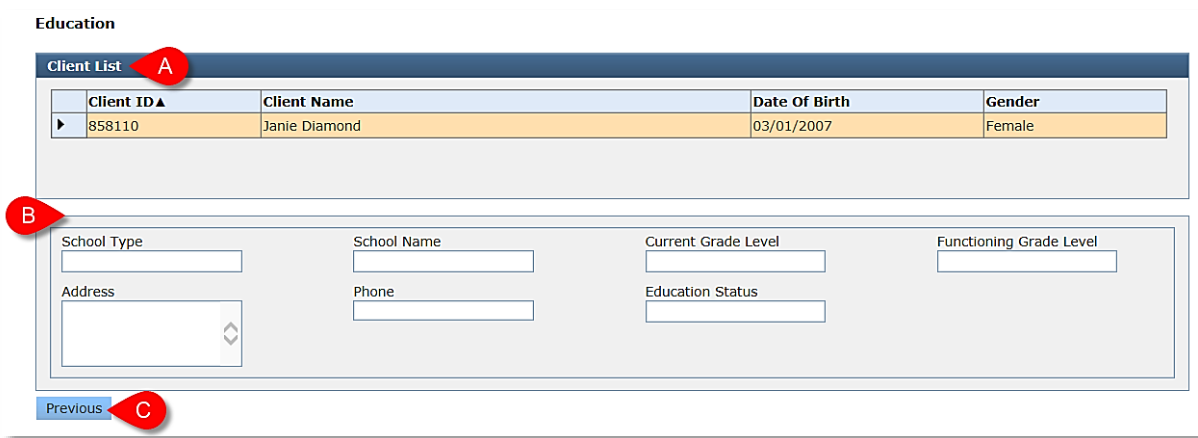
2. *Behavioral Health/Physical Health Summary Screen*: Highlight the *Behavioral Health/Physical Health Summary Screen* report in the grid and click Show. A printable PDF version of the *Client Behavioral Health/Physical Health Summary* will open in a new window.

3. *Placement History*: Highlight the *Placement History* report in the grid and click Show. The Packet – *Placement Episode List* screen will appear.



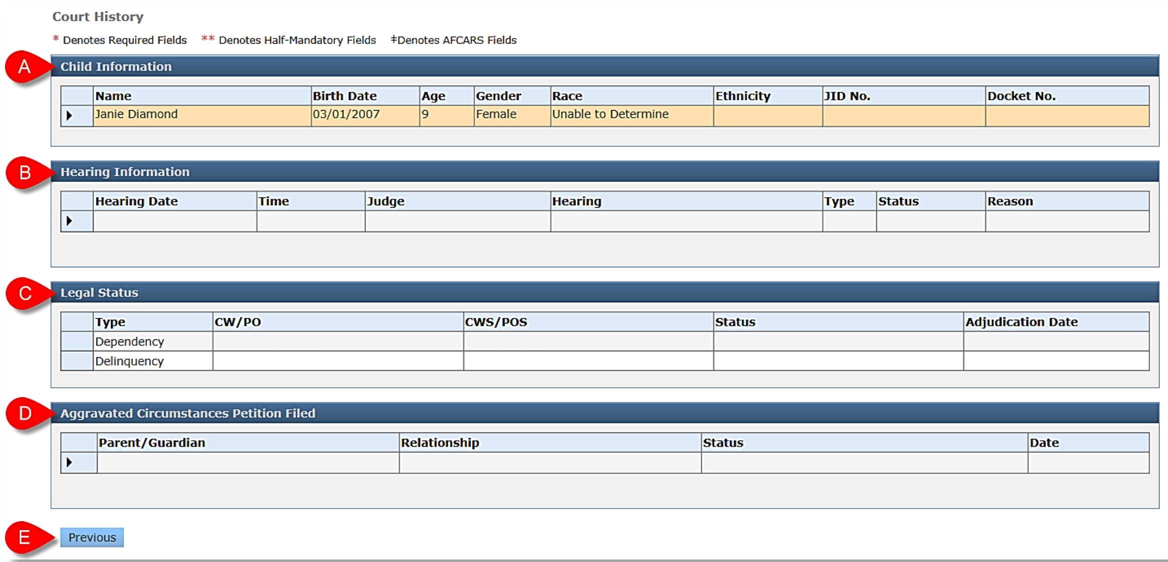
   a. The *Placement Record* grid includes the following information: *Date Entered, Date Exited, Referral Method, Provider Type, Provider Name/Collateral, Status,* and *Service*.
   b. The *Placement Record* grid defaults to the current placement and any Online postings. Select the *View All Placement Episodes* radio button to view the full list including prior placements. Note: *View Void Placements* is disabled; only internal CYF staff have access to view voided placements.
   c. To navigate back to the *Packet Details* screen click Previous.

4. *Education Information*: Highlight the *Education Information* report in the grid and click Show. The Packet – *Education* screen will appear. This information comes from the *Education* screen in the **Case > Client** screens.



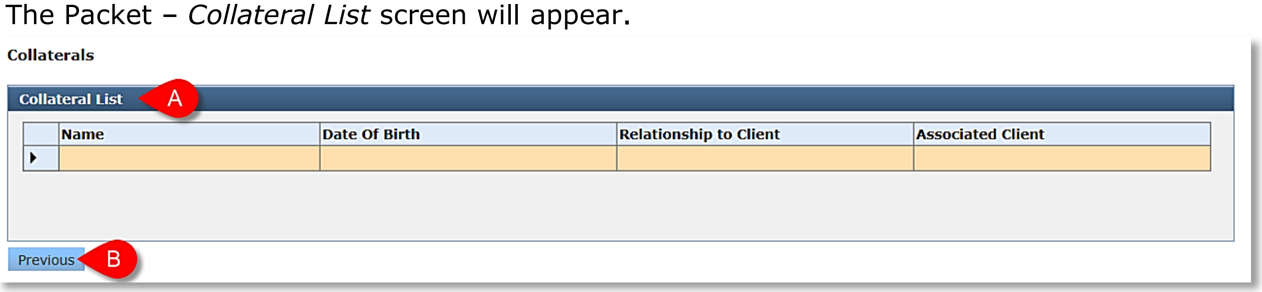
a. Highlight a client in the *Client List* if there is more than one Client listed.
b. The Education Information for the highlighted client appears here and includes: *School Type, School Name, Address, Phone, Current Grade Level, Functioning Grade Level*, and *Education Status*. This information comes from the *Education* screen in the **Case > Client** screens.
c. To navigate back to the *Packet Details* screen click Previous.

5. *Court Information – Judge, Upcoming Court Hearings*: Highlight the *Court Information – Judge, Upcoming Court Hearings* report in the grid and click Show. The Packet – *Court History* screen will appear.



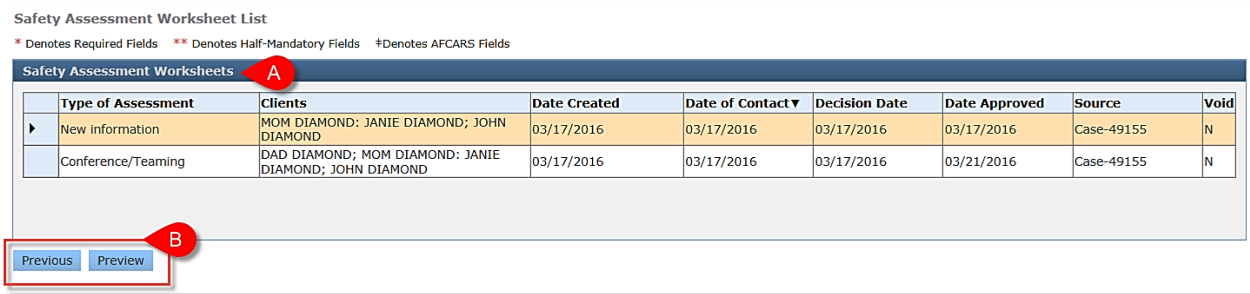
   a. *Child Information* grid: Contains basic information on the child including: *Name, Birth Date, Age, Gender, Race, Ethnicity, JID No.* and *Docket No*.
   b. *Hearing Information* grid: Lists hearings scheduled for the child highlighted in the *Child Information* grid.
      Contains the following hearing information: *Hearing Date, Time, Judge, Hearing, Type, Status* and *Reason*.
   c. *Legal Status* grid: Contains information on the child's legal status including: *Type*, *CW/ PO* (Caseworker/ Probation Officer), *CWS/POS* (Casework Supervisor/Probation Officer Supervisor), *Status* and *Adjudication Date*.
   d. *Aggravated Circumstances Petition Filed* grid: Contains information if an Aggravated Circumstances Petition has been filed against a parent or guardian for the child.
      Contains the following information: *Parent/Guardian* the petition has been filed against, *Relationship* to the child, *Status* and *Date*.
   e. To navigate back to the *Packet Details* screen click Previous.

6. *Collaterals*: Highlight the *Collaterals* report in the grid and click Show.
   The Packet – *Collateral List* screen will appear.



   a. *Collateral List* grid: Contains a list of all of the current collaterals associated with the case. Information in the grid includes: *Name* of the Collateral, *Date of Birth*, the Collateral's *Relationship to Client* and the *Associated Client*.
   b. To navigate back to the *Packet Details* screen click Previous.

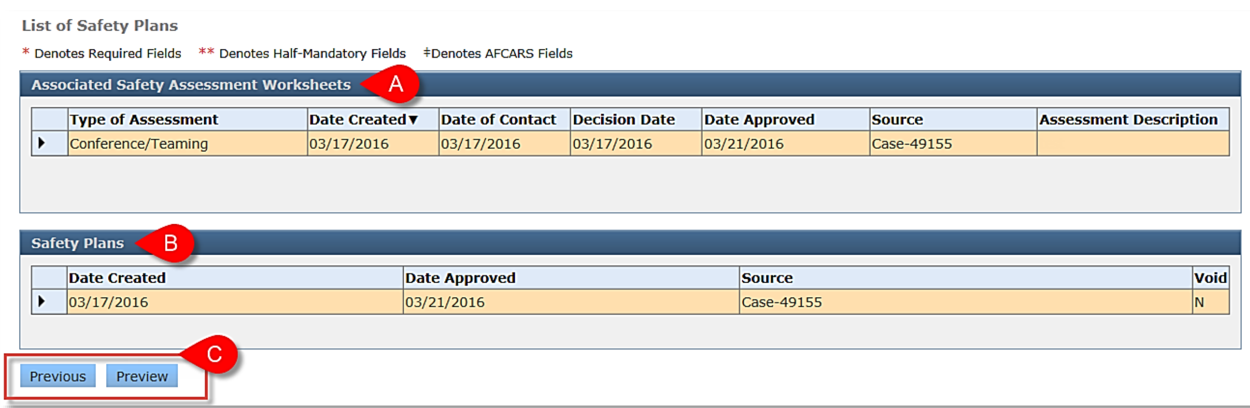
7. *Safety Assessment*: Highlight the *Safety Assessment* report in the grid and click Show. The Packet – *Safety Assessment Worksheet List* screen will appear.



a. *Safety Assessment Worksheets* grid: Contains a list of all of the approved safety assessments for this case. Information in the grid includes: *Type of Assessment, Clients* involved in the assessment, *Date Created*, *Date of Contact, Decision Date, Date Approved, Source* and *Void* (indicates whether or not the assessment has been voided).
b. Highlight a plan in the *Safety Assessment Worksheets* grid and click Preview to generate a printable PDF of the highlighted safety assessment.

   To navigate back to the *Packet Details* screen click Previous.

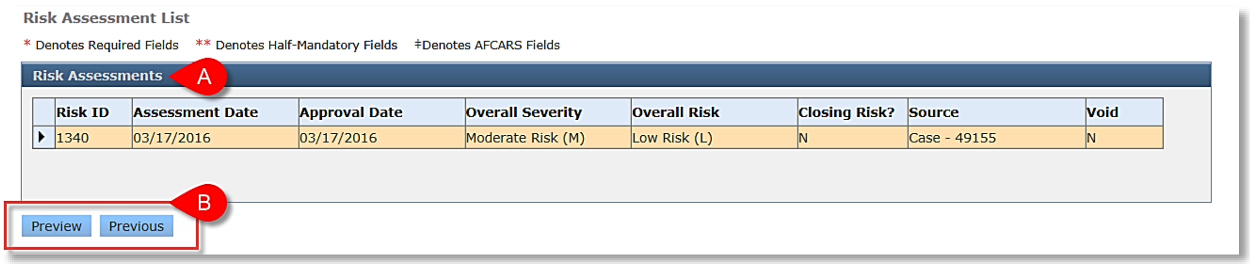
8. *Safety Plan*: Highlight the *Safety Plan* report in the grid and click Show. The Packet – *List of Safety Plans* screen will appear.



a. *Associated Safety Assessment Worksheets* grid: Contains a list of all of the Safety Assessments for this case that require a Safety Plan. Information in the grid includes: *Type of Assessment,* Date *Created*, *Date of Contact, Decision Date, Date Approved, Source* and *Assessment Description.*
b. *Safety Plans* grid: Contains all of the approved Safety Plans connected to the Safety Assessment highlighted in the *Associated Safety Assessment Worksheets* grid
c. Click Preview to generate a printable PDF of the highlighted *Safety Plan* in the *Safety Plans* grid.

   To navigate back to the *Packet Details* screen click Previous.

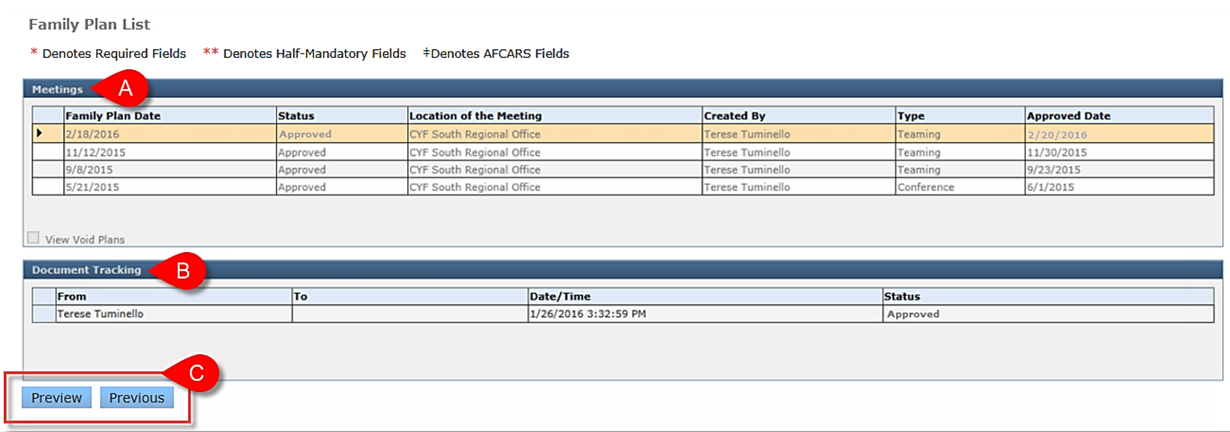
9. *Risk Assessment*: Highlight the *Risk Assessment* report in the grid and click Show.
The Packet – *Risk Assessment Worksheet List* screen will appear.



a. *Risk Assessments* grid: Contains a list of all of the approved risk assessments for this case. Information in the grid includes: *Risk ID, Assessment Date, Approval Date, Overall Severity, Overall Risk, Closing Risk?* (indicates if the risk assessment was completed for Case Closure) *Source* and *Void* (indicates whether or not the assessment has been voided).
b. Highlight a plan in the *Risk Assessments* grid and click Preview to generate a printable PDF of the highlighted risk assessment.

   To navigate back to the *Packet Details* screen click Previous.

10. *Family Plan*: Highlight the *Family Plan* report in the grid and click Show.
The Packet – *Family Plan List* screen will appear.



a. *Meetings* grid: Contains a list of all of the approved family plans for this case. Information in the grid includes: *Family Plan Date, Status, Location of the Meeting, Created By, Type* (Conference or a Teaming) and *Approved Date.*
   Note: *View Void Plans* is disabled; only internal CYF staff have access to view voided family plans.
b. *Document Tracking* grid: Displays the approval process information for the highlighted family plan and includes the following information: *From* (requestor), *To* (approver), *Date/Time* of approval and *Status*.
c. Highlight a plan in the *Meetings* grid and click Preview to generate a printable PDF of the highlighted family plan.

   To navigate back to the *Packet Details* screen click Previous.

11. *Personality Photos*: Highlight the *Personality Photos* report in the grid and click Show. A printable PDF version of the *Personality Photos* will open. Personality Photos are used in Placement referrals as a way to assist in finding foster homes for older youth in care.

> ***Tip:*** *A report for providers is generated on a weekly basis that contains information about cases (both Placement and Non-Placement Services) that were closed in the previous week and the reauthorizations that are due in the current week.*

For more information…

For assistance, please contact the Allegheny County Service Desk at servicedesk@alleghenycounty.us or 412-350-4357 (Option 2 for DHS). To access the Self Service Tool go to http://servicedesk.alleghenycounty.us.

This job aid and additional user materials are located on the DHS Amazon site at http://dhswbt.s3.amazonaws.com/KIDSJobAids/index.htm