

## **COMPLETING A SERVICE REVIEW WITHIN A CASE REVIEW**

Navigate to the Case

1. Click the Case Review/SAR link in the navigation menu

The screenshot shows a web application interface. On the left is a navigation menu with links: Legal Custody/Status, Living Arrangement, Initial Removal, Placement Request, Placement, Visitation Plans, Independent Living, AR Family Service Plan, AR Family Service Review, Case Plan, and Case Review/SAR (which is circled in red). The main content area has a table with columns 'Worker Name' and 'Role'. The first row shows 'Training01, User' and 'Case Reviewer , Court Worker , Worker , Primary Worker , PlacementWorker'. Below this is a section titled 'Eligibility Assignment Information' with a table containing 'Person Name' and 'Eligibility Specialist(s)'. The text 'No Assignment Information Found' is displayed. A 'Close' button is at the bottom left.

2. Click the edit link next to the Case Review “In Progress”

The screenshot shows a table titled 'Case Review(s)/SAR(s)' with 'Result(s) 1 to 1 of 1' and 'Page 1 of 1'. The table has columns: Case Review Type, Status, Approved Date, Case Plan#, Agency, and an action column. The first row is '3 Month Case Review' with status 'In progress', approved date '1/03', and agency 'IHS Training'. The 'edit reports' link in the first column is circled in red. A 'delete' link is in the last column.

Case Review Type	Status	Approved Date	Case Plan#	Agency	
<a href="#">edit reports</a> 3 Month Case Review	In progress	1/03		IHS Training	<a href="#">delete</a>

3. Click the Service Review link

The screenshot shows a table with columns 'Topic' and 'Status'. The rows are: Identifying Information (Completed), Safety Review (Not Provided), Service Review (Current Case Plan Services - Progress Provided for 0 of 2 Risk Contributors), Strength and Needs Update (Not Completed), Risk Reassessment (Not Completed), and Case Analysis (Not Completed). The 'Service Review' row is circled in red.

Topic	Status
<a href="#">Identifying Information</a>	Completed
<a href="#">Safety Review</a>	Not Provided
<a href="#">Service Review</a>	Current Case Plan Services - Progress Provided for 0 of 2 Risk Contributors
<a href="#">Strength and Needs Update</a>	Not Completed
<a href="#">Risk Reassessment</a>	Not Completed
<a href="#">Case Analysis</a>	Not Completed

4. Click the services link

Service Review Information

Concerns

	Name(s)	Risk Contributors	Progress Addressing Concerns
<a href="#">edit process</a> <a href="#">services</a>	Bob, Sponge Squirrel, Sandy	Parenting Practices	

5. Click the edit link next to the service you are going to review

Service Review Details

Case Plan Participant: Bob, Sponge - 10/26/1969  
Squirrel, Sandy - 10/22/2003

Risk Contributor: Parenting Practices

Below, identify all Services Provided/Planned to Address this Concern.

	Case Member Name(s)	Service Category / Type	Service Classification	Effective Dates
<a href="#">edit</a>	Bob, Sponge; Squirrel, Sandy	Case Management / Information & Referral Services	Case Member	04/07/2014 -
	Case Member / Caregiver History			
<a href="#">edit</a>	Bob, Sponge; Squirrel, Sandy	Counseling / Individual counseling	Case Member	05/01/2014 -
	Case Member / Caregiver History			

6. Click the Service Review tab

Case > Workload > Case Services

Service Information	Service Review	Service Activity
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Case ID: 2646016 Case Status: Open ( 04/07/2014 )  
Case Name: Bob, Sponge Case Category: Ongoing

Service Information

Agency: IHS Training  
Risk Contributors: Impact of Past Services

Effective Date: \* 05/01/2014 Estimated Service End Date:   
Service Category: \* Counseling Service Type: \* Individual counseling

Member Service Status History

Current Status All Statuses

	Case Member	Status	Provider	Service Description	Provider Address	Status Begin Date/End Date	Created in Error
<a href="#">edit</a>	Bob, Sponge - 10/26/1969	Scheduled	Montgomery Co. Children Services	Individual counseling	3304 N Main St. Dayton, OH 45405-2709	06/10/2014	
<a href="#">edit</a>	Squirrel, Sandy - 10/22/2003	Scheduled	Montgomery Co. Children Services	Individual counseling	3304 N Main St. Dayton, OH 45405-2709	06/10/2014	

Case Member Name: \*  Add Status / Provider

7. Click the Add Service Review button

The screenshot shows a form titled "Service Review". At the top, there is a header bar with two columns: "Case Member(s) / DOB" and "Review Date". Below this header, there is a large empty text area. On the left side of the form, there is a blue button labeled "Add Service Review", which is circled in red.

1. Complete the necessary information. Enter the review date, select Case Members, Service Recommendation and Participation Status if one is required for the service you are reviewing. If Barriers exist, enter the Barrier Type and Barrier Comments. You have the option to complete the Recommendation Comments and Participation Comments narrative text boxes, however, they are not required. Select Save.

The screenshot shows a detailed form titled "Service/Activity Review Details". At the top, there is a breadcrumb trail: "Case > Workload > Case Services > Service Review". Below this, there is a section for "Review Information" with the following fields: "Review Date" (06/25/2014), "Case Member(s) / DOB", "Service Recommendation", "Participation Status", and "Barrier Type". The "Review Date" field is circled in red. Below the "Review Information" section, there is a table with two rows of data. The first row is for "Bob, Sponge - 10/26/1969" and the second row is for "Squirrel, Sandy - 10/22/2003". The "Service Recommendation" column has a "Continue" dropdown for both. The "Participation Status" column has a "Partial Attendance" dropdown for the first row and an "Attended All" dropdown for the second row. The "Barrier Type" column has a dropdown menu for both rows. Below the table, there are three text areas for "Recommendation Comments", "Participation Comments", and "Barrier Comments". Each text area has a "Spell Check" button and a "Clear" button. The "Recommendation Comments" and "Participation Comments" text areas are circled in red. At the bottom of the form, there is a "Save" button and a "Cancel" button, both circled in red.

8. Click the Save button

Service Information		Service Review		Service Activity	
Case ID:	2646016	Case Status:	Open ( 04/07/2014 )		
Case Name:	Bob, Sponge	Case Category:	Ongoing		
Service Category:	Counseling	Service Type:	Individual counseling		
-Service Review-					
Case Member(s) / DOB				Review Date	
<a href="#">edit</a>	Squirrel, Sandy - 10/22/2003; Bob, Sponge - 10/26/1969			06/25/2014	<a href="#">delete</a>
<a href="#">Add Service Review</a>					
<a href="#">Apply</a> <a href="#">Save</a> <a href="#">Cancel</a>					

9. Service Review has been completed. Continue these same steps for all services. When all services have been reviewed, click the Close button.

Case ID:	2646016	Case Status:	Open ( 04/07/2014 )		
Case Name:	Bob, Sponge	Case Category:	Ongoing		
Case Review Type:	3 Month Case Review	Review for Case Plan Number:	1.03	Status:	In progress
-Service Review Details-					
Case Plan Participant:	Bob, Sponge - 10/26/1969 Squirrel, Sandy - 10/22/2003				
Risk Contributor:	Parenting Practices				
Below, identify all Services Provided/Planned to Address this Concern.					
Case Member Name(s)		Service Category / Type	Service Classification	Effective Dates	
<a href="#">edit</a>	Bob, Sponge; Squirrel, Sandy	Case Management / Information & Referral Services	Case Member	04/07/2014 -	
<a href="#">Case Member / Caregiver History</a>					
<a href="#">edit</a>	Bob, Sponge; Squirrel, Sandy	Counseling / Individual counseling	Case Member	05/01/2014 -	
<a href="#">Case Member / Caregiver History</a>					
<a href="#">Close</a>					