

QUICK START GUIDE FOR COMPLETING A CASE REVIEW AND COMPLETING A SAR

COMPLETING A CASE REVIEW

Navigate to the case

1. Click the Case Review/SAR link in the navigation menu
2. Click the Add Case Review/SAR button
3. Select the Case Review Type from the dropdown then select the Case Plan being Reviewed
4. Once you have selected the Case Plan being Reviewed, click OK
5. Click Save
6. Select Safety Review from the Case Review Topics page
7. Complete the Safety Review Information and the Safety Response Review. Once the information is complete, select Save
8. Select Service Review from the Case Review Topics page
9. From the Current Case Plan Services tab click the edit progress link
10. Complete the Service Details Information and select Save. You will need to complete this step for each concern in this case plan
11. From the Current Case Plan Services tab click the services link
12. Click the edit link next to the service you are reviewing
13. Click the Service Review Tab
14. Click the Add Service Review button
15. 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.

16. Click the Save button
17. Service Review has been completed. Continue these same steps for all services. When all services have been reviewed, click the Close button
18. From the Prior Case Plan Unlinked Services tab if unlinked services exist, you need to complete steps 9 through 17 for these unlinked services
19. From the Services Not linked to Case Plan tab if not linked services exist, click the Edit Progress button
20. Complete the Service Details information and select Save
21. To review Services Not Linked to Case Plan, follow steps 12 – 17
22. Select Strengths and Needs Update from the Case Review Topics Page
23. Complete the Risk Contributors by selecting a drop down value for each one. You must complete each narrative text box unless N/A is selected. Select the Strengths and Needs status and then select Save
24. Select Risk Reassessment from the Case Review Topics page

25. Complete the Risk Reassessment if required (required unless “yes” is selected for the question “Is this a non-child abuse and neglect case or child“ren” are in PC?”) by answering each question and Calculate Score this will display the Policy Override page
26. You have the ability to apply Policy Overrides by completing the Policy Override Information. You also have the ability to select the Override Final Risk Level. Select Save.
27. Select Case Analysis from the Case Review Topics Page
28. Complete the Case Analysis Information and Select Save. (You can also Process for Approval your Case Review at this time)

COMPLETING A SAR

Navigate to the Case

1. Click the Case Review/SAR link in the navigation menu
2. Click the Add Case Review/SAR button
3. Select the Case Review Type from the dropdown then select the Case Plan being Reviewed
4. Once you have selected the Case Plan being Reviewed, click OK
5. Click Save

COMPLETING A SAR CONTINUED

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6. Select Safety Review or (if the child has been in placement for 30 days or more, you will select Reunification Assessment) from the Case Review Topics page
7. Complete all Safety Review Information and the Safety Response Review or if the child has been in placement for 30 days or more, you will be required to complete a Reunification Assessment instead of a Safety Review. Once all information is complete, select Save
8. Select Service Review from the Case Review Topics page
9. From the Current Case Plan Services tab click the edit progress link
10. Complete the Service Details Information and select Save. You will need to complete this step for each concern in this case plan.
11. From the Current Case Plan Services tab click the services link
12. Click the edit link next to the service you are reviewing
13. Click the Service Review Tab
14. Click the Add Service Review button
15. 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
16. Click the Save button
17. Service Review has been completed. Continue these same steps for all services. When all services have been reviewed, click the Close button
18. From the Prior Case Plan Unlinked Services tab if unlinked services exist, you need to complete steps 9 through 17 for these unlinked services
19. From the Services Not linked to Case Plan tab if not linked services exist, click the Edit Progress button
20. Complete the Service Details information and select Save
21. To review Services Not Linked to Case Plan, follow steps 12 – 17
22. Select Strengths and Needs Update from the Case Review Topics Page
23. Complete the Risk Contributors by selecting a drop down value for each one. You must complete each narrative text box unless N/A is selected. Select the Strengths and Needs status and then select Save
24. Select Risk Reassessment from the Case Review Topics Page.
25. Complete the Risk Reassessment if required (required unless “yes” is selected for the question “Is this a non-child abuse and neglect case or child“ren” are in PC?”) by answering each question and Calculate Score this will display the Policy Override page.
26. You have the ability to apply Policy Overrides by completing the Policy Override Information. You also have the ability to select the Override Final Risk Level. Select Save.
27. Click the Custody/PSUP/In-Home Supportive Services link
28. Click the Edit link under Safety and Appropriateness of Current Placement Information
29. Complete the required information and click Save
30. Click the Permanency Information link
31. Click the edit link and answer each question and click Save. Once all questions are answered, click Close
32. Click the Permanency Goals link
33. Click the edit link
34. Complete the Narrative Details and (Med/Ed information if the child is in an out of home placement setting) and click OK
35. Click Save
36. Click the Candidate for Foster Care link (If the Child(ren) are in Placement you will not see this link
37. Click the edit link
38. Complete the Candidate Explanation information and click Save
39. Click Close
40. Click the Signature Notice/Information link

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41. Complete the Signature Details and click Save
42. Click the Case Analysis link
43. Complete the Case Analysis Information and Select Save. (You can also Process for Approval your Case Review at this time)