



Pathway to SHINES!
Participant's Guide
February 2009

Module

1 Course Introduction

Welcome to
Pathway to SHINES!

Notes

6/13/2008

1

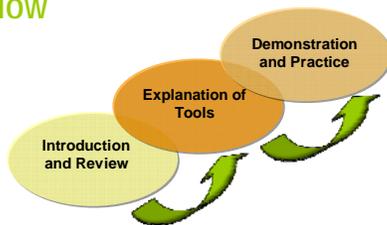
Introductions

Notes

- ✓ Name
- ✓ County/Region
- ✓ Position
- ✓ One Expectation for This Training

Course Introduction

Course
Flow



Notes

6/13/2008

3

Course Introduction

Housekeeping

- Start, lunch, break, and end times
- Attendance policy
- Cell phones and pagers
- Side conversations
- Internet use
- Restrooms/water fountains/room temp
- Smoking
- Fire and evacuation plan
- Parking lot
- Participant Sign in sheet

6/13/2008

4

Notes

Course Introduction

Agenda

| Day 1 | Day 2 | Day 3 |
|--|--|---|
| <ul style="list-style-type: none">▪ Module 1: Course Intro▪ Module 2: Tools▪ Module 3: Initial Foster Care▪ Lunch▪ Module 3: Initial Foster Care | <ul style="list-style-type: none">▪ Module 3 Initial Foster Care▪ Module 4: Foster Care Case Management▪ Lunch▪ Module 4: Foster Care Case Management | <ul style="list-style-type: none">▪ Module 4: Case Management▪ Lunch▪ Assessment▪ Evaluation |

12/23/2008

5

Notes

Module

2

**Navigation/Tools
Overview**

SHINES Navigation/Tools Overview

Tools

Learning Objectives

After completing this module, you will be able to:

- List and define the tools available to support the use of SHINES
- Explain how, and when, to access each SHINES support tool.
- Explain basic navigation in SHINES
- Explain SHINES terminology

On your computer's desktop in the field, there will be a Georgia SHINES icon. Once the user clicks the icon, the SHINES logon screen appears. Only access the SHINES system through this icon.

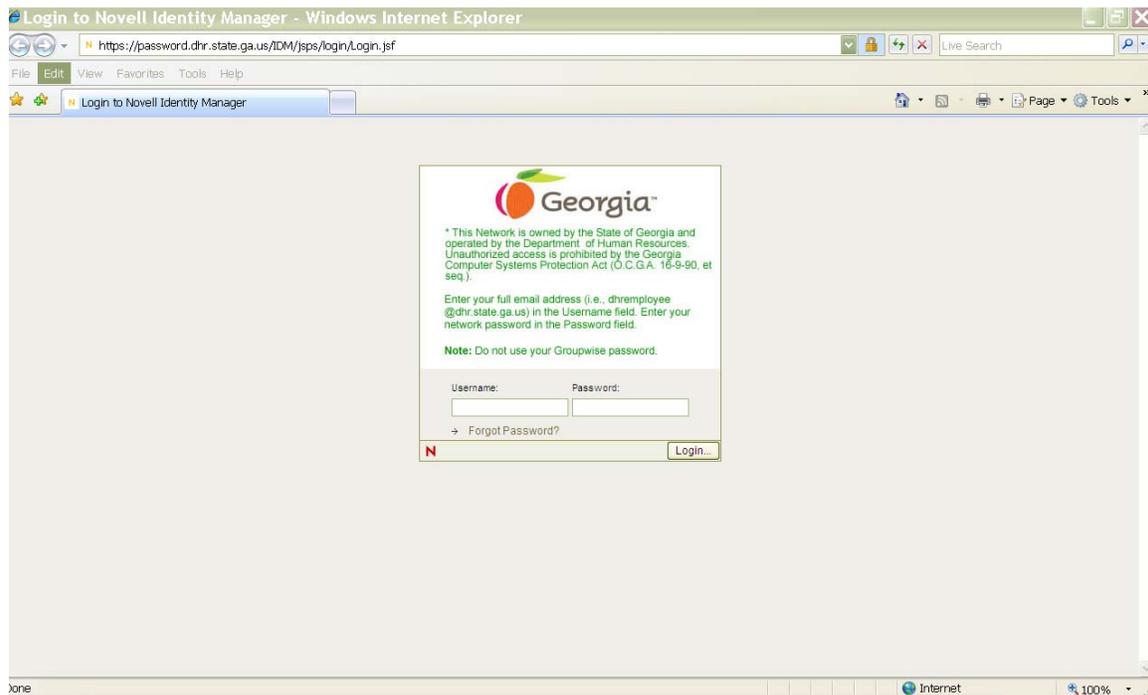
Log on screen:



*****Do not enter the training site after the class is completed.**

Above is the training site logon screen. You will be assigned a temporary user name and password. For training, we have to tell SHINES who we are through the "Logon As" radio button. For Track training we will select the Case Manager radio button. The Live site logon screen will not include the Logon As (UserID) field or these radio buttons. Users will utilize their existing Novell ID's and Password's to log into SHINES. The user's county has informed the State Office as to the user's position and authority level in SHINES (ie. case manager, resource developer, etc.) to establish the user's security profile. SHINES passwords are to be updated every 30 days and are updated through the Novell change password procedures.

Virtual Private Network and Password maintenance



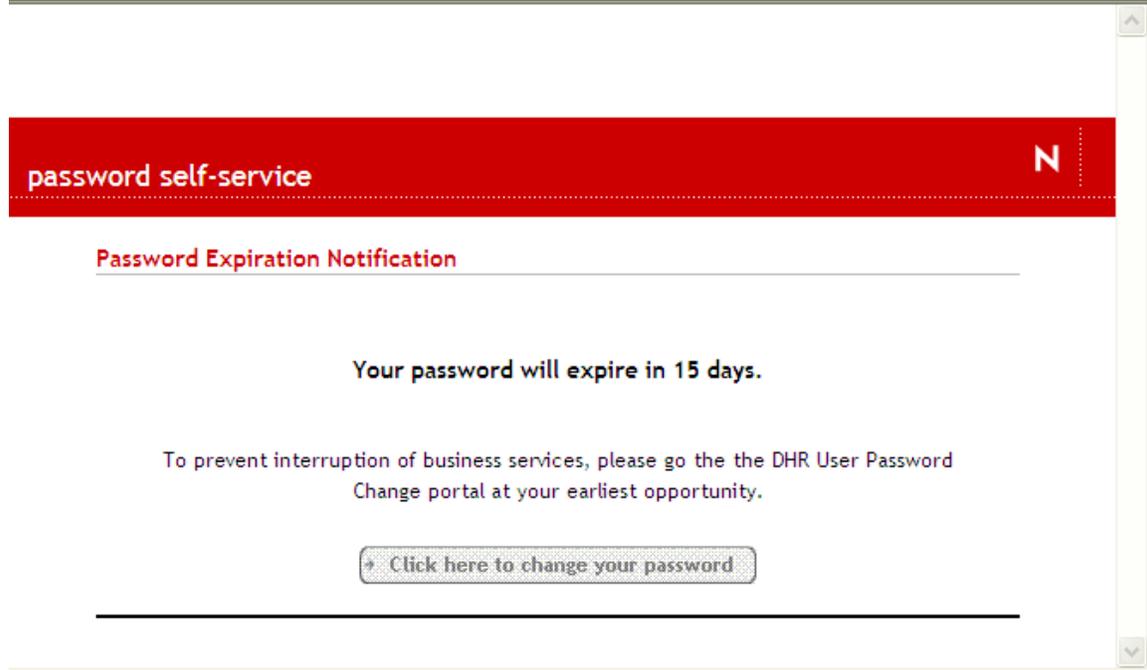
SHINES is an extremely secured web based system. Therefore, the system can only be accessed when connected to a DFCS server such as a State, Regional or County DFCS office. The system can only be accessed outside of a DFCS server if the user has an active VPN (Virtual Private Network) account. Users are responsible for ensuring the VPN account passwords are continually valid. VPN passwords expire every 45 days; Your VPN password and SHINES password should be the same. It is important to change your password before your grace period expires. If your grace period expires, then you will need to contact the help desk to reset your password. The new password is valid for approximately 45 days. There is an e-mail reminder system for expiration of the Novell password (Novell, SHINES and VPN should be tied together). It is the user's responsibility to keep their password updated. Users can update their password anytime they want before expiration emails are sent by going through the Password Change site.

Notes:

Updating the Password will update the VPN and Novell/SHINES password. Refer back to County specific procedures for VPN accounts and use. Contact your BAS if you do not have the Password Change icon.

Password Alert E-mail

Subject: Password Expiration Warning



The screenshot shows an email interface. At the top, a green header bar contains the subject line "Subject: Password Expiration Warning". Below this is a red banner with the text "password self-service" on the left and a white "N" logo on the right. Underneath the banner, the text "Password Expiration Notification" is displayed in red, followed by a horizontal line. The main body of the email contains the text "Your password will expire in 15 days." in bold. Below this, a paragraph reads: "To prevent interruption of business services, please go the the DHR User Password Change portal at your earliest opportunity." A button with a right-pointing arrow and the text "Click here to change your password" is centered below the paragraph. A horizontal line is positioned below the button. The email content is enclosed in a light gray border with scroll arrows on the right side.

When you receive the alert, proceed to the link provided. This will take you directly to the Novell Identity Manager login. If you are not connected to a DFCS Server, then you will need to login to your VPN in order to access the Novell Identity Manager web site.

SHINES Support

Shines Toolkit

- Online Help 
- Web-Based Training (WBT)
- Participant Guide
- OTSS (Over The Shoulder Support)
- SHINES Help Desk

These are some of the resources you have access to when you are back in your office.



Online Help  : This is an internal SHINES feature that includes job aids, page descriptions, user manual, data change request forms, release notes and other help topics in SHINES. A more detailed explanation will be discussed later in this module.

Tools

Web Based Training Navigation Review

- Overall Navigation
- Tab/Page Organization
- Stage Process flow
- ID Numbers (Case, Person, Stage)
- Abbreviations/Terminology
- Assigned Workload
- Staff Summary
- My Tasks -To Do Lists
- Tasks/Alerts
- Messages
- Required Fields
- Security

4/23/2008

11

Tools

Web Based Training Navigation Review

- Add** Use the "Add" button to add supplemental information about your case in SHINES.
- Copy** The "Copy" button is similar to the "Add" button, except that it pre-populates the information that is being copied into a new section. Once the information is brought over, you can edit any of the fields.
- Save** The "Save" button will save the information you are working on in your case file.
- Delete** "Delete" will remove the information from the system.
- Edit** "Edit" enables you to make changes to information in SHINES.
- Cancel** The "Cancel" button stops an action you are attempting to take.
- Continue** The "Continue" button takes you to the next page in whatever section you are on in SHINES

4/23/2008

12

Web-Based Training (WBT): This must be completed as part of new worker training and is located in the LMS (learning management system) web site. This is an introduction to the SHINES system.

Participant Guide: These are used as a reference guide to include training notes related to specific program area topics. Keep the guide given to you in class.

OTSS (Over the Shoulder Support): This refers to regional/county staff that are familiar with the SHINES system and can assist with navigational/procedural issues.

SHINES Help Desk Contact Information

- Phone Number 800-764-1017 (Option 2)
- Hours of Operation Monday – Friday 8:00am – 8:00pm
- Information gathered on each call
 - SHINES User Name
 - Case Name
 - Case ID
 - Stage Name
 - Stage ID
 - SHINES Tab/Page Name
 - Be prepared to discuss details on the precise steps taken, as well as the exact situation in which you encountered difficulty

SHINES Help Desk: User's should not try to resolve a system problem or navigation problem without assistance as this may lead to more extensive data fixes. After consulting with the Online Help feature in SHINES, Participant Guide and OTSS staff (Over The Shoulder Support), then contact the SHINES Help Desk for resolution. Please be sure to have Case ID and Stage Names/Numbers as well as a detailed description of the problem.

The SHINES Help Desk is designed with three tiers. Based on the issue, the appropriate tier will be assigned to address the concern.

Tier 1 – Help Desk (IT staff)

Tier 2 – Subject Matter Experts (Policy/procedures)

Tier 3 – System Design Team (Technical Development)

SHINES Overview

The following discussion is an overall navigation and terminology review. Be sure to close out all other internet applications as well as turn off your Pop-Up Blocker before we get started. SHINES uses “Pop-Ups” to communicate with us when there are problems.

Tablet/PC Routine Preparation

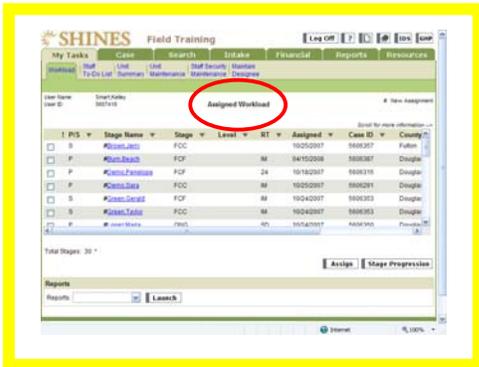
Users should ensure the following:

- Popup Blocker is always turned off.
- Tablet/PC's resolution set at 600 to 800 pixels will provide a full screen view. (note: this will require more scrolling)
- Ensure Tablets/PC's are using Internet Explorer 6.0 and not 6.5 or 7.0 or Windows Live Toolbar. If so, call in a Help Desk Ticket. You will lose error messages and calendar functions.
- Recommend using a mouse for navigation.
- On a weekly basis, delete temporary internet files and cookies by selecting Tools – Internet Options then delete files.
- Do not select workstation only while connected to a DFCS server



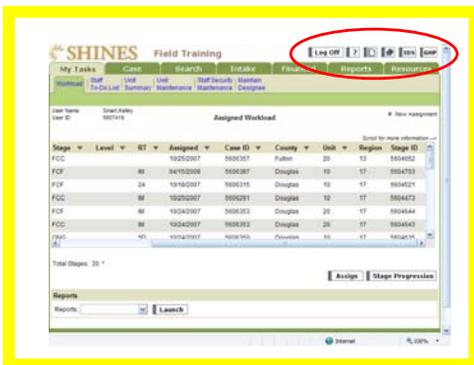
Use the TRN number and password assigned by your instructor.

Make sure you are logged into the correct training site!



After users log onto SHINES from the Logon Screen, the Assigned Workload screen displays. This screen is a listing of all cases assigned to the user.

SHINES Tools



At the top of the SHINES interface you will see several icons that represent tools and support available to you while in SHINES.

Log Off Log Off – To log off SHINES system. There is a timer (status bar must be checked under toolbars) in the lower left hand corner of your screen. The system will Log Off when the clock reaches zero. It will reset itself as you work in SHINES.

? Online Help – Previously discussed.
Reminder: Come here to get system updates and helpful tips.

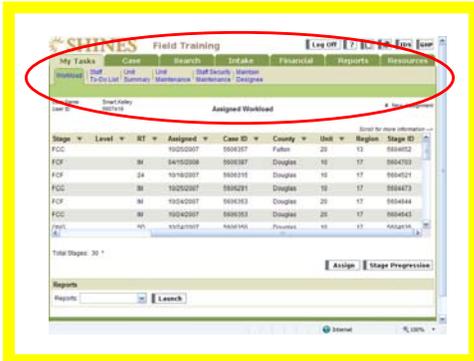
Forms Online – Even though SHINES replaces numerous forms, not all are obsolete.

ODIS – All program area Policy manuals for easy reference.

IDS Internal Data System (IDS) – Legacy system to use when screening for prior history (Master Index, Placement Central and PSDS).

GHP Georgia Health Portal – To be used for screening CPS/FC children Medicaid enrollment status.

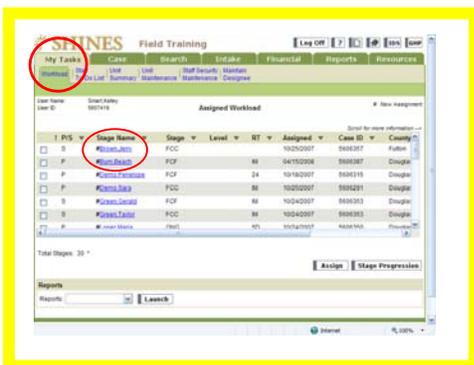
Tab System



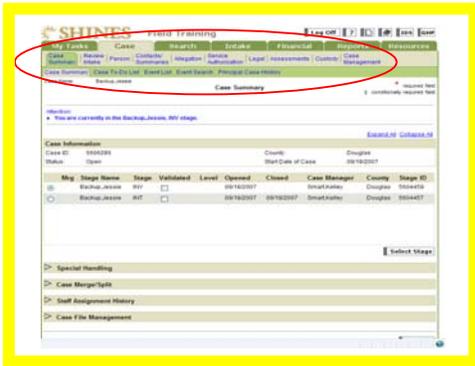
In Georgia SHINES, tabs are the navigational features along the top of each Georgia SHINES page that allow you to navigate from one task to another; they resemble the tabs that would be used to separate sections in a file folder or ring binder. Depending on what area of Georgia SHINES you are in, there can be as many as three levels of tabs.

- (1) First-level tabs remain the same throughout Georgia SHINES; they represent the broad categories of tasks and information within Georgia SHINES.
- (2) Second-level tabs represent the sub-categories that correspond to the first-level tab that has been selected. The set of second-level tabs that appear will vary with each stage in each program.
- (3) Third-level tabs will appear only when there are sub-categories that correspond to the second-level tab that has been selected.

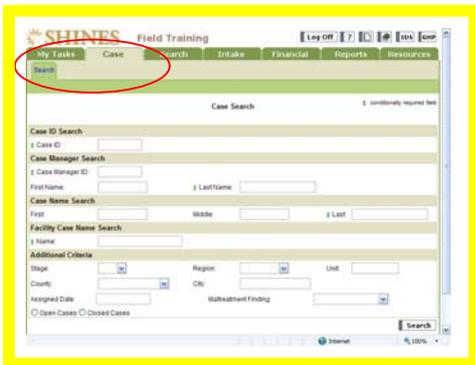
Overview of Tabs



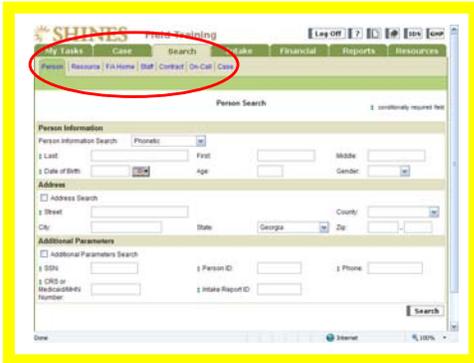
My Task 1st level tab: For Case Managers, this tab includes the **Workload 2nd** level tab and displays the Assigned Workload screen. Users can access a case record from this screen by selecting the stage name hyperlink. The remaining 2nd level tabs in this training site will only be displayed for management use; therefore, these tabs will not be displayed or accessible to case managers.



After selecting a stage name hyperlink, the system displays the case summary page of the SHINES case record which generates the corresponding 2nd level and now 3rd level tabs. 3rd level tabs only exist in a case record.

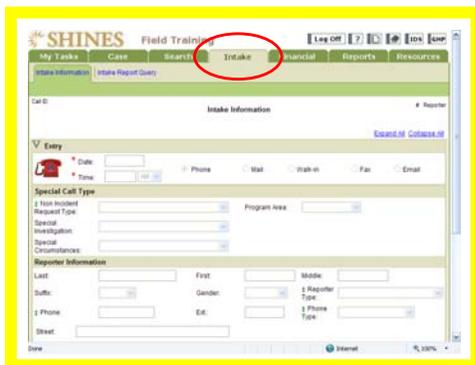


Case 1st level tab: Case 2nd level tab displays. Users can search for cases by Case ID, Case Manager, Case Name, Facility Case Name and Additional Criteria. If a user is not assigned the case, the case information is read only.

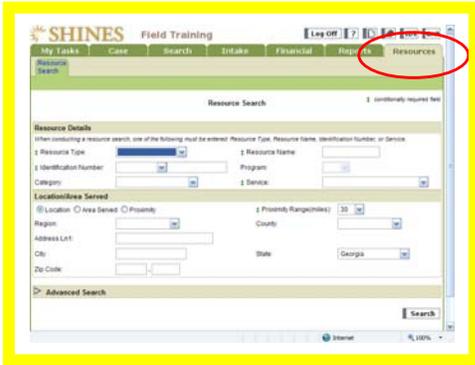


Search 1st level tab: This tab allows users to search the SHINES system for various entities.

- **Person 2nd level tab** searches for an individual person within SHINES.
- **Resource 2nd level tab** searches for a service provider who has a contract (formally known as MOU) entered within SHINES.
- **F/A Homes 2nd level tab** searches for Foster and/or Adoptive Homes within SHINES.
- **Staff 2nd level tab** searches for all DFCS staff statewide within SHINES.
- **Contract 2nd level tab** allows financial specialists and case managers to search for contracts stored within SHINES.
- **On Call 2nd level tab** searches for a specific county contact person for on-call schedules within SHINES.
- **Case 2nd level tab** searches for a case file using specific parameters within SHINES (same procedures associated with Case 1st level tab)



Intake 1st level tab: This tab is used to generate an Intake for any program area. Further discussion of Intake will take place later in this training. (This is comparable to Form 453)



Resource 1st level tab: **Resource 2nd level tab** searches for a service provider who has a contract entered within SHINES. (same procedures associated with Search 1st level tab)

Assigned Workload Screen



**** The upper left hand corner of the Assigned Workload page displays the Case Manager's name and User ID which is automatically assigned by SHINES. (The User ID replaces the CWID)

**** SHINES has vertical and horizontal scroll bars that are required for navigation.

Assigned Workload Headers:



The arrows after each header are sorters. When activated, the column will sort in alphabetical or numerical order.

! This marks a case as "sensitive". Access is restricted to only those assigned to the case as well as management.

P/S

Each case has one primary worker assigned. There can also be up to four secondary workers assigned to a case. (i.e., Boarding County, Safety Resource County, etc)

P - Primary worker (can only have one of these)

S - Secondary worker (can have up to 4 of these excluding supervisors)

Examples: FTM facilitator, Out of Town courtesy interviews, coverage when someone out on family leave, etc...

Note: The assigned worker's Supervisor also has access to work in the case. This does not take up any of the secondary worker positions.

Stage Name

This column displays the name of the assigned stage; it also serves as a hyperlink into the stage's SHINES case record. (This replaces the Case Name as it now relates to stages)

**** There is a note in the upper right hand corner of the Assigned Workload

page which alerts the Case Manager that newly assigned stages that have not been viewed are flagged with the # sign. Until the Case Manager clicks inside the stage file, the # sign will remain. After a user enters the stage file, the file is no longer flagged as a new assignment.

Stage Acronym

A Stage is a particular period within the life of a case. (i.e., Intake, Investigation, Family Preservation Services, Foster Care, Adoptions, etc.)

INT= Intake

DIV=Diversion

INV=Investigations

ONG=Ongoing (Family Preservation Services)

FCC=Foster Care Child

FCF=Foster Care Family (Birth Family of whom custody was removed from/ AKA Foster Child Family)

Note: A foster child's case is divided into two sections or stages in SHINES, the child's and the birth family's. Case Manager's will enter data in both stages.

PFC=Post Foster Care (Aftercare, Relative Subsidy, ILP Services)

ADO=Adoption

PAD=Post Adoption (Adoption Assistance, Post Adoption Services)

FAD=Foster and/or Adopt Homes

Note: Think of a case record as a book. Each book has several chapters. Each stage could correlate to a chapter within the life of that family. For example, the INT stage of a case would correlate to chapter 1 of a book.

Level

This column displays a CPS Investigation and/or Family Preservation Case's assigned Level of Concern. (None, Very Little, Somewhat, Considerable, Extreme)

RT

This column refers to the case Response Time.

IM = Immediate to 24 hour response

24 = 24 hour response

5D = 5 day response

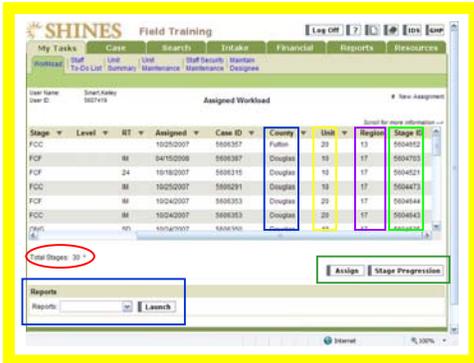
The RT from Intake may also be displayed in other stages as the case progresses.

Assigned Date

This column displays the date that the stage was assigned to the staff member.

Case ID

This column displays the case identification number of the case to which the stage belongs. Case Id's are assigned at Intake. (This is associated with our old county specific six digit case numbers). Case Id's for a family do not change no matter how many stages the family progresses into.



County

This column displays the primary county of the case/stage.

Unit

This column displays the unit to which the stage is assigned. Each Supervisor is assigned a specific unit number.

Region

This column displays the Region of the county/unit to which the stage is assigned.

Stage ID

This column displays the stage identification number assigned by the system. Stage Id's are numbers that are assigned with each stage progression (for example if a child has been through investigation, ongoing and foster care, the case will have three stages; therefore, three stage Id's).

Example: The INV and ONG stages for Marcie Culhane #04 have the same Case Id but different Stage Id's. Also, this correlates back to the idea of a case being like a book with several chapters as mentioned in the previous Stage Acronym note. *SHINES assigns all Case ID and Stage ID numbers.

Total Stages

This field displays the current number of stages assigned to the case manager. Note: The total stages for a FC workload will be more than for CPS due to FCC and FCF stages make up one case.

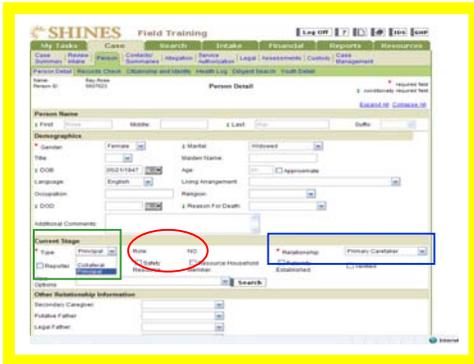
Assign and Stage Progression buttons

These features are for management functions only and will not appear on a Case Manager's Assigned Workload page.

Reports

In SHINES there are several screens that include a report launch function. When this function displays on a page, a report may be selected and launched for review and/or printing.

Additional SHINES Acronyms/Terminology/Navigation

The image shows a screenshot of the SHINES Field Training software interface. The window title is "SHINES Field Training". The interface includes a navigation menu at the top with options like "Home", "Cases", "Reports", "Personnel", "Supports", and "Resources". Below the menu, there are tabs for "Person Detail", "Personnel Check", "Substantiated and Unsubstantiated", "Health Log", "Child's Status", "Child Care", "Person ID", "No New Births", and "Person Detail". The "Person Detail" tab is active, showing a form for entering personal information. The form includes fields for "Person Name", "DOB", "Gender", "Race", "Ethnicity", "Maiden Name", "Age", "Language", "Religion", "Living Arrangement", "Reason For Death", and "Medical Comments". There are also dropdown menus for "Current Stage" (with "PRN" selected and circled in red) and "Relationship" (with "Primary Caretaker" selected and boxed in blue). At the bottom, there are fields for "Secondary Contact", "Public Father", and "Legal Father".

Type Acronym

PRN=Principal

Principals include children alleged or found to be in need of protection and all other siblings in the home; all parents and parent substitutes who are part of the household; everyone responsible for the care, custody, or welfare of the children in the family or household, even if not a parent or parent substitute; and each alleged or designated perpetrator or victim/perpetrator of child abuse or neglect.

COL=Collateral

Collaterals are persons who provide additional information on a case, such as a physician or a neighbor.

Role Acronyms

AP=Alleged Maltreater

NO=No Role (no involvement in the maltreatment)

UK=Unknown (not known if involved in the maltreatment)

VC=Alleged Victim

PC= Primary Client (For Foster Care Child) System automatically assigns role

Relationship Acronym

This is a required field. Use this drop-down box to select the individual's relationship to the Primary Caretaker in CPS cases and to the Foster Child in Placement Cases.

In **INT, INV, ONG** stages, there must be a **PK – Primary Caretaker** selected.

In **FCC** stages, the Foster Child relationship code changes from Son/Daughter to Self and Primary Caretaker changes to Parent, etc and all other Principals in the case change as appropriate.

In **FCF** stages, the relationship codes change to coincide with the FCC stage relationships of all the principals.



Action Status

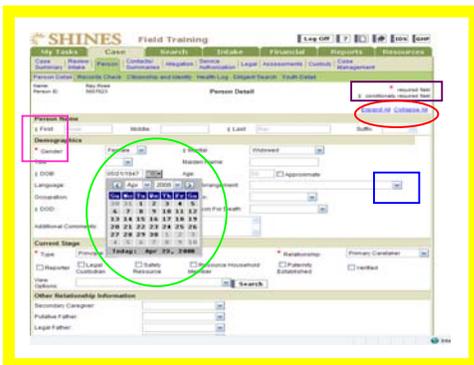
In SHINES when actions are completed, codes will display to determine the status.

APRV= Approved (Approval Granted)

PROC= Processing or In Process (The status of your action before you submit for approval)

PEND= an action has been submitted for approval but not yet approved

COMP= an action is complete and does not require approval



Mandatory Fields

Red *= Mandatory Fields

Green track marks=Conditionally Mandatory Fields

Expandable Sections

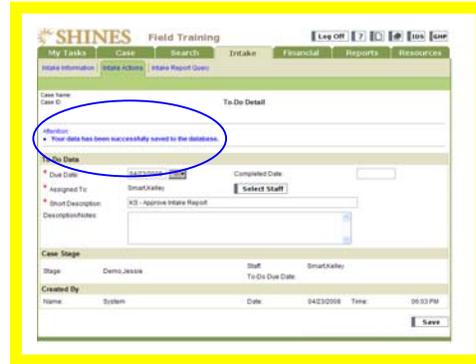
On certain SHINES pages, there are expandable sections of which data must be entered. The Expand All or Collapse All hyperlinks allow the user to navigate the page accordingly.

Calendar Icons

The “date picker” function allows quick and easy documentation of dates.

Drop Down Fields

SHINES uses drop down fields to capture required data. Not every option will be used. However, options chosen should be consistent within the region/county. Users need to ensure they click off of the drop down field in order to lock the option.



Messages and Errors

Blue – **Messages** are notes for your information or to confirm data is saved.

Red – **Errors** on page will not allow users to continue. Some errors have hyperlinks included in order for the user to navigate directly to the error site. Exception: A red message appears when Risk Assessment is Complete.



Case To-Do-List

Case To Do List = For Case Managers to review continually. Alerts are system or user generated and used as a tickler system to ensure case/policy requirements are met. Use this page to view all of the To-Do's assigned to this stage. Every alert that a case generates is also sent to the supervisor. When supervisors delete alerts from their Staff To-Do lists, then the alert is deleted from the Case To-Do List.

Security

System times out after 30 minutes. Moving from tab to tab, saving pages, save and submitting and also continuing will restart the thirty minutes. Therefore, while working in SHINES, users are rarely timed out and lose data. The system clock is located at the bottom left corner of each SHINES page.

Radio Buttons and Checkboxes

SHINES has numerous fields that include radio buttons and checkboxes. Users need to be aware that once a radio button is selected, it may be moved but not deleted. In order to clear a radio button, users will have to leave the screen and perhaps lose data that has not been saved. Only one radio button is allowed to be selected at the time. Checkboxes will allow users to deselect and/or choose multiple selections.

Copy and Pasting into SHINES from external sources

When users receive documentation from external sources (i.e. email attachments, etc), users should copy into Notepad and then copy and paste into SHINES. This procedure alleviates formatting issues. Most users are displaying Notepad as a desktop shortcut for easy access. Notepad is located under Programs – Accessories. Right click on Notepad and select Send to Desktop.

Let's get started

Tools

Training Site Logon Page

<https://uatshines.dhr.state.ga.us:445>



- Logon with your trn number
- **My user name is:** trn_____
- **Password is:** _____
- Click the radio button that is your role

4/23/2008 14

Each participant should be given a trn# and password to log onto the SHINES training site at <https://uatshines.dhr.state.ga.us:445>. Make sure you are logged on to the correct training site!

Module

3 Initial Foster Care

| | |
|---|--|
| <p><i>Intake</i></p> <h2 style="text-align: center;">Module 3: Initial Foster Care</h2> <p style="text-align: center;">6/12/2008 2</p> | <p><u>Notes</u></p> <p>Introduce Module 3</p> <p>In this module, we will demonstrate how to use SHINES to complete the Initial Foster Care Case Management.</p> |
| <p><i>Initial Foster Care</i></p> <h3>Learning Objectives</h3> <p>After completing this course, you will be able to:</p> <ul style="list-style-type: none"> ▪ List the steps required to complete Initial Foster Care in SHINES. ▪ Identify the SHINES pages, fields, and information used to complete each step of the Initial Foster Care process. ▪ Using Toolbox tools and sample case studies, demonstrate how to complete the Initial Foster Care process. <p style="text-align: center;">6/12/2008 3</p> | <p><u>Notes</u></p> <p>Review the Learning Objectives</p> <p>After completing this module, you will be able to:</p> <ul style="list-style-type: none"> ➤ List the steps required to complete the Initial Foster Care process in SHINES. ➤ Identify the SHINES pages, fields, and information used to complete each step of the Initial Foster Care process. ➤ Using Toolkit tools and sample case studies, demonstrate how to complete Initial Foster Care and how to modify and save information on Foster Care pages. |
| <p><i>Initial Foster Care</i></p> <h3>Steps & Process</h3> <ol style="list-style-type: none"> 1. Review CPS Stages 2. Change Relationship Information and Review Person Detail 3. Request Payment of Care 4. Enter Placement Information 5. Request Service Authorization 6. Complete Initial Medicaid Application 7. Complete IV-E Application 8. Record Family Team Meeting 9. Record MDT 10. Record CCFA Recommendations 11. Record Child Plan 12. Record Family Plan <p style="text-align: center;">6/12/2008 4</p> | <p><u>Notes</u></p> <p>These are the “high-level” steps for Initial Foster Care.</p> <p>Briefly review these steps.</p> <p>This process takes you through the Initial Foster Care tasks that are required on SHINES. Remember there are several other requirements that are outside of SHINES for case management.</p> <p>Let’s begin the process.</p> |

Step 1: Review CPS Stages

Notes for Discussion:

- Continue following policy regarding review of all case information.

Getting Started: Begin these steps from the [Assigned Workload](#) page.

| Action | Notes |
|--|--|
| 1. Click the Stage Name hyperlink | #04Culhane, Ashley – FCC The Case Summary page displays. Notes for discussion: <ul style="list-style-type: none">▪ To enter a different stage, click a radio button and then click the Select Stage button.▪ # sign indicates newly assigned stage |
| 2. Click the Intake stage radio button and Select Stage button. | The Case Summary page displays with a message: You are currently in the Culhane, Marcie, INT stage. |
| 3. Click the Record/Review Intake second level tab | The Intake Actions page displays |
| 4. Scroll down to Forms section and select Intake Report from the dropdown box and Launch button | Intake Report Form displays <ul style="list-style-type: none">▪ Intake will be in read only format▪ Review the Intake▪ Users can also review Intake Information and Intake Actions pages, Narrative, Person Details. |
| 5. Click on My Tasks first level tab | Assigned Workload page displays |
| 6. Click the Stage Name hyperlink | Culhane, Ashley – FCC The Case Summary page displays. Notes for discussion: To enter a different stage, click a radio button and then click the Select Stage button. |

| | |
|---|--|
| <p>7. Click the Investigation stage radio button and Select Stage button.</p> | <p>The Case Summary page displays with a message: You are currently in the Culhane, Marcie, INV stage.</p> <ul style="list-style-type: none"> ▪ Investigation is in read only format ▪ Review Investigation by selecting appropriate second level tabs. <p>Repeat steps to review ONG stage.</p> <ul style="list-style-type: none"> ▪ Notice that users can navigate between all stages using the case summary radio buttons to select stage, with the exception of returning from the INT stage. |
| <p>8. Select Case Summary second level tab</p> | <p>The Case Summary page displays</p> |
| <p>9. Click the FCC stage radio button and Select Stage button.</p> | <p>The Case Summary page displays with a message: You are currently in the Culhane, Ashley, FCC stage.</p> |

Step 2: Change Relationship Information and Review Person Detail

Notes for Discussion:

- In foster care stages, the child is the primary client. Relationships are updated to reference the child instead of the primary caretaker. In the INT, INV, and ONG stages, relationships reference the primary caretaker.
- Person details are required to complete many other functions in SHINES. For example, the Initial Medicaid Application, Foster Care Eligibility Application (FCEA), and Placement Information. Entering person details before attempting these functions will simplify the process.
- Continue following policy regarding review of all case information.

Getting Started: Begin these steps from the [Case Summary](#) page of the [Ashley Culhane-FCC](#) stage.

*Make sure you are in the correct stage (Ashley Culhane #04.)

| Action | Notes |
|---|--|
| 1. Click the Stage Name hyperlink. | Culhane, Ashley – FCC The Case Summary page displays. |
| 2. Click the Person second level tab. | The Person List page displays. Notes for Discussion: <ul style="list-style-type: none">▪ Review the Person list to determine whose relationship codes and person details need to be updated.• Rel/Int header reflects relationship code from CPS stages that need to be updated. |
| 3. Click the Name hyperlink. | Culhane, Ashley The Person Detail page displays. Notes for discussion: <ul style="list-style-type: none">• This is typical behavior in SHINES – the name hyperlink on the list page takes you to a person detail page. |

| | |
|--|---|
| <p>4. Review Person Name and Demographics sections for needed updates.</p> | <p>Notes for discussion:</p> <ul style="list-style-type: none"> ▪ Review Person Name for accuracy. If the name is incorrect, user cannot make the correction in the Person Name section. This must be completed in the Name History expandable section. ▪ Review Demographics section for accuracy. Mandated sections for future actions include: Gender Marital Living Arrangement (This field is not changed after the CPS coding for PSDS reporting. This field is used for children only) |
| <p>5. Click the Relationship dropdown box in the Current Stage section.</p> | <p style="text-align: right;">Self</p> <p>Notes for discussion:</p> <ul style="list-style-type: none"> • Types and Roles codes remain unchanged • System changes foster child's role automatically from VC - alleged victim to PC – primary client and AP – alleged maltreater to No – no role. |
| <p>6. Click the Save button.</p> | <div style="text-align: right;">  </div> <p>The person information is saved.</p> <p>Notes for discussion:</p> <ul style="list-style-type: none"> ▪ System requires user to save data prior to entering an expandable section. ▪ The system will alert the user with a message if data is not saved, user will lose data previously entered. |
| <p>7. Expand the Address section</p> | <p>Note for discussion:</p> <ul style="list-style-type: none"> ▪ The child's address should never change from the home of removal address. Adult addresses will need to be updated. ▪ Do not add each placement address. |

| | |
|--|--|
| 8. Click the hype link for Residence with check under Primary column | <p style="text-align: right;">Residence</p> <p style="text-align: right;">The Address Detail page will display.</p> |
| 9. Click check box for Removal Home | <p style="text-align: right;"><input type="checkbox"/> Removal Home</p> |
| 10. Click the Save Button. | <p style="text-align: right;"></p> <p>The Person Detail page will display. Notes for Discussion:</p> <ul style="list-style-type: none"> ▪ This will allow the removal address to populate to the Address of Home Removal section on the Application and Background page. |
| 11. Expand the Phone section | <p>Note for discussion:</p> <ul style="list-style-type: none"> ▪ This section should be updated if child's phone number changes (ie. Cell phone, etc) Adult phone numbers will need to be updated. ▪ Do not add placement phone numbers. |
| 12. Expand the Race/Ethnicity section | <p>Review for accuracy</p> |
| 13. Expand Tribal and Additional Information section | <p>Review for accuracy</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> ▪ Continue to update this section throughout the life of the case. |
| 14. Expand the Person Characteristics section. | |

| | |
|---|--|
| <p>15. Click the Detail button and review information.</p> | <p>The Person Characteristics page displays.</p> <p>Notes for discussion:</p> <ul style="list-style-type: none"> • Review the person characteristics and update as needed. • Person characteristics are used to help place the child in an appropriate setting. • Users must select Not Yet Diagnosed at a minimum until the CCFA is completed. If a diagnosis has been determined by a professional and the agency has this documentation, then code appropriately. • Adoption section must be completed to determine if child has been previously adopted. • DOB or approximate Age is required for sections to be generated to capture data for adults. • Unless an adult has had an assessment, don't complete this section. • Continue to update this section throughout the life of the case. |
| <p>16. Click the Save button if updates are entered.</p> | <p>The Person Detail page displays.</p> |
| <p>17. Expand the Medication section</p> | <p>Note for discussion:</p> <ul style="list-style-type: none"> ▪ Continue to update this section throughout the life of the case. ▪ If child or an adult is on medication, enter data. ▪ Even if child is not on medication, enter data regarding allergies. |
| <p>18. Expand Name History section</p> | <p>Notes for discussion:</p> <ul style="list-style-type: none"> ▪ Review for accuracy ▪ If correction is needed, enter correct name which will automatically change the name in the Person Name section. |

| | |
|---|---|
| <p>19. Expand the Person Identifiers section and review.</p> | <p>Notes for discussion:</p> <ul style="list-style-type: none"> • All principals on the case should have a CRS ID. Success screening should assist with the avoidance of duplicate CRS Id's. • To add CRS ID's – see procedures at end of section. • Review the identifiers listed and add any additional identifiers. • Continue to update this section throughout the life of the case. |
| <p>20. Expand Person Merge/Split section</p> | <p>Notes for discussion:</p> <ul style="list-style-type: none"> ▪ Refer to agency protocol regarding Merge/Split procedures. |
| <p>21. Expand Income and Resources section</p> | <p>Notes for Discussion:</p> <ul style="list-style-type: none"> • A CRS number must be assigned prior to requesting Success data. • After the request is made (by only clicking the button), it takes from a few hours to overnight to complete due to a batch system. • Public Assistance (TANF, FS), Child Support information in Success will be listed on Income and Resources list. • Success data must be requested prior to completing the Initial Medicaid and IV-E application for Foster Care. • Income/Resources from Success and STARS will pull over onto the person detail page when the MES requests. • This requests for data does not replace the process and procedures for screening for Success information. ▪ Success data only screens for the CRS ID assigned. If found that there was an already existing CRS ID, users must end date the incorrect one and re-request for the existing one to appear. |
| <p>22. Expand the Education section.</p> | |
| <p>23. Click the hyperlink for Brooks Elem.</p> | |
| <p>24. Enter a Withdrawn Date.</p> | <p>(Enter a date one week prior to today's date.)</p> |
| <p>25. Enter a Withdrawn Grade.</p> | <p style="text-align: right;">2</p> |

| | | |
|-----|--|---|
| 26. | Click the SAVE button. | The Person Detail page displays. |
| 27. | Click the Add button. | The Education Detail page displays. |
| 28. | Click the Education Type dropdown box. | School |
| 29. | Click the Select Resource button. |  Resource Search page will display. |
| 30. | Select the Resource type from the drop down box. | School |
| 31. | Enter the Resource Name . | Palmetto Trainer Notes: <ul style="list-style-type: none"> • Enter the first four letters to show how the search results bring back resources with similar names. • The training environment may not have the school added to the database. In that case, just manually enter the name on the Education Detail page and discuss. |
| 32. | Click the Search button. |  Resource Results page displays. |
| 33. | Click the radio button next to the Resource. | Palmetto Elementary |
| 34. | Click the Continue button. |  The Education Detail page will display with the School name in the School/Day Care Field |
| 35. | Expand the Foster Care Case Plan Information section. | |
| 36. | Select the No radio button for Are the School Records in the child's file? | NO |
| 37. | Complete the Comments field. | Ashley is changing schools as her new foster home is not in the same school district as her mother's home. |
| 38. | Click the Save button. | The Person Detail page displays. |

| | |
|--|--|
| <p>39. Click the Citizenship and Identity third level tab.</p> | <p>The Citizenship and Identity page displays.</p> <p>Notes for discussion:</p> <ul style="list-style-type: none"> • Mandatory Fields include: Citizenship/Alien Status Mother Married at Child's Birth • Complete citizenship and identity information for foster child. • Make updates as needed under all applicable sections. • Citizenship and identity are required to complete the FCEA and Initial Medicaid Application. |
| <p>40. Click the Save button.</p> | <p>The Citizenship and Identity page displays.</p> |
| <p>41. UPDATE PERSON DETAIL PAGE FOR MARCIE CULHANE and REVIEW/EDIT ALL SECTIONS AS APPLICABLE.</p> | |
| <p>Click the Person second level tab.</p> | <p>The Person List page displays.</p> |
| <p>42. Click the Name hyperlink.</p> | <p>Culhane, Marcie</p> |
| <p>43. Click the Relationship dropdown box.</p> | <p>Biological Mother</p> <p>Note for discussion: Users can also use code of Parent as long as this is an overall procedure for the county agency.</p> |
| <p>44. Click the Save button.</p> | <p></p> <p>The person information is saved.</p> |
| <p>45. Expand all sections and review/edit information as needed.</p> | <p>Note for discussion:</p> <ul style="list-style-type: none"> ▪ Not all sections are required to be completed for adults as they are for the foster child. |
| <p>46. UPDATE PERSON DETAIL PAGE FOR MURRAY AVERS and REVIEW/EDIT ALL SECTIONS AS APPLICABLE.</p> | |
| <p>Click the Person second level tab.</p> | <p>The Person List page displays.</p> |
| <p>47. Click the Name hyperlink.</p> | <p>Avers, Murray</p> |
| <p>48. Click the Relationship dropdown box.</p> | <p>Other/non-related person</p> |

| | |
|--|--|
| 49. Enter in the Special Relationship box. | Mother's live in boyfriend. |
| 50. Click the Save button. | <div style="text-align: right; border: 1px solid black; padding: 2px; display: inline-block;">Save</div> <p>The person information is saved.</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> ▪ For relative principals/collaterals who are not caretakers for a foster child, not all fields or expandable sections on the Person Detail page are applicable. |
| 51. Click on Case Summary second level tab | <p>The Case Summary page displays.</p> <ul style="list-style-type: none"> ▪ Direct the trainees to update the role of Heather to Sibling. ▪ (Second level Person tab, Select Heather's name, Change relationship and Save.) |
| 52. Select the Heather Culhane FCC radio button and Select Stage . | <p>The Case Summary page displays.</p> |
| 53. Make necessary relationship changes for all principals on FCC person list. | <p>Note for discussion:</p> <ul style="list-style-type: none"> • Follow the same procedure as in Ashley's FCC stage with the exception that Heather will now be coded as "Self" and Ashley will be coded as a "Sibling". |
| 54. Select the FCF stage radio button and Select Stage . | <p>The Case Summary page displays.</p> |
| 55. Make necessary relationship changes for all principals on FCF person list. | <p>Note for discussion:</p> <ul style="list-style-type: none"> ▪ Updating same information from each person detail page of the FCC stage can be completed but is not necessarily required. Ask for your county procedures. ▪ Relationship codes are mandatory to coincide with the FCC stage. |
| 56. Click on Case Summary second level tab | <p>The Case Summary page displays.</p> |
| 57. Select the FCC stage radio button and Select Stage . | <p>The Case Summary page displays.</p> |

Notes for Discussion:

- The child's address at the time of removal should not be changed, even though SHINES

allows you to do so.

- Must change Child and Primary Caregiver's relationship codes in order to complete Foster Care IV-E Application.
- Records Checks should always be reviewed/updated for all caretakers and/or new individuals added to the case that may become a caretaker for the child.

Procedures to Add a CRS ID# in SHINES

Person Identifiers

Person second level tab – Person List page displays
Select **Name Hyperlink** – Person Detail page displays

Expand the **Person Identifiers** section

Click the **Add** button

Add

The Person Identifiers Detail page displays.

Notes for discussion:

- A CRS ID number is required for all principals in the case such as all children and caregivers. SUCCESS screening should assist with the avoidance of duplicate CRS Id's. If a person has SUCCESS history, the Client ID is the same as the CRS ID.

Several different person identifiers can be documented on this page.

Click the **Type** dropdown box.

CRS ID#

Click the **CRS Request** button.

CRS Request

The CRS Inquiry page displays.

Click the **Inquire** button.

Inquire

The CRS Inquiry page refreshes and displays search results.

Note for discussion:

In order to avoid duplication of assignments of CRS numbers, inquiry is mandatory.

Click the **Registration** button.

The CRS Registration page displays.

Notes for discussion:

- If a match is found, select the radio button and Select button to bring over the existing CRS ID.

Click the **Screening** button.

The CRS Registration page refreshes and displays search results.

Click the **Add to CRS** button.

A confirmation message displays in a new window.

Notes for discussion:

- If a match is found, select the radio button and Select button to bring over the existing CRS ID.

Click the **OK** button.

The Person Detail page displays.

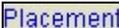
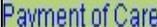
Step 3: Request Payment of Care

Notes for Discussion:

- Payment of Care replaces Form 527.
- The Payment of Care page must be approved **prior to** entering Placement Information.
- The child's Legal Status must be entered **prior to** submitting Payment of Care for Supervisory approval.

Scenario: Child was placed in the home of Joyce Smith, a DFCS Family Foster Home.

Getting Started: Begin these steps from the **Case Summary** page of the **Ashley Culhane, FCC STAGE**.

| Action | Notes |
|--|--|
| 1. Click the Placement second level tab. |  The Placement List page displays. |
| 2. Click the Payment of Care third level tab. |  The Payment of Care List page displays. |
| 3. Click the Add button. |  The Payment of Care page displays. |
| 4. Click the Payment of Care Type dropdown box. | Regular Foster Care Per-Diem Note for discussion: <ul style="list-style-type: none">▪ Depending on which type is selected, fields are generated to capture information required.▪ Special Foster Care Per-Diem refers to per diem which includes to special add-on rates at the county level. Caution not to confuse with Specialized Foster Care Per-Diem. |
| 5. Click the Continue button. |  The Payment of Care page refreshes and displays additional fields. |

6. Click the calendar icon in the **Start Date** field.

 **Today's Date**

Note for Discussion:

- End date is used when policy directs a review to be conducted within a specific time frame. This will allow for additional checks and balances to ensure that reviews are held.
- Terminate date refers to the actual date that the specified payment of care type ends.
- The Base Per-Diem rate will automatically be calculated by the system after the user saves the page.
- Special add-on rate field is to enter the amount approved by the county director (\$.50 to \$1.75)
- If situation involves concurrent per-diem, complete checkbox and document comments.
- If situation involves special add-on rate, provide comments.

7. Click the **Save and Submit** button.



The To-Do Detail page displays.

Notes for discussion:

- If user is not ready to submit information for Supervisory approval, click Save button.
- User's need to ensure that approval is directed to the appropriate approving manager. If manager needs to be changed, select Select Staff button and choose correct manager for approval to be routed to.
- User's can enter comments at this point if applicable.

8. Click the **Save** button.

Save

The To-Do Detail page refreshes and displays a confirmation message.

Note for discussion:

- Always ensure that you receive the confirmation message to complete the routing of the submission for approval.

Attention:

- **Your data has been successfully saved to the database**

Notes for Discussion:

- If placement resource changes but the type remains the same, no action needed to update the payment of care.
- If type of payment of care changes, must terminate existing payment of care using the day before date and create a new payment of care using today's date.
- The "Head in the Bed" rules still applies.
- Sib 1 Incentives: The system looks for the number of FCC stages in a case and how many of them are linked to the same placement. The system then makes the adjustment without any additional input from the user.
- Payment of Care must be completed in each child's FCC stage.
- **Edit of incorrect Payment of Care:**
 - Information in a Payment of Care is incorrect; because of an error in inputting the data or because of a change to the Placement Information page then you can have the Payment of Care deleted from the case and enter a new one. If case managers or supervisors foresee the need to delete an incorrect Payment of Care then they should contact their County Director, Deputy Director or Program Administrator and have that person delete the information. Follow these steps to delete a Payment of Care.

Step 4: Approve Payment of Care (Supervisory function)

Notes for Discussion:

- Continue following policy regarding review of all case information prior to approval. You can update the case as needed before approving.

Getting Started: Begin these steps from the [To-Do Detail](#) page.

| Action | Notes |
|--|--|
| 1. Click the My Tasks first level tab. | The Assigned Workload page displays. |
| 2. Click the Staff To-Do List second level tab. | The Staff To-Do List page displays. Note for discussion: <ul style="list-style-type: none"> ▪ Search feature could expedite location of tasks/alerts. |
| 3. Click the Task hyperlink next to the GS – Approve Payment of Care task. | The Payment of Care page displays. |
| 4. Click on the Payment of Care hyperlink for the pending approval action | The Payment of Care page displays. Notes for discussion: <ul style="list-style-type: none"> • Review the Payment of Care type and detail to assure accuracy. |
| 5. Click the Approval Status button. | The Approval Status – Approve Payment of Care page displays. |
| 6. Complete the Password field. | Use the password provided by your instructor. Notes for discussion: <ul style="list-style-type: none"> • In this field, use the password you use to log in to SHINES. |
| 7. Click the Approve button. | A confirmation message displays in a new window. Notes for discussion: <ul style="list-style-type: none"> • To reject the intake, complete the Comments and Password fields and click the Reject button. |
| 8. Click the Cancel button. | The Approval Status page displays. |

9. Click the **Save** button.



The Staff To-Do List page displays.

Step 5: Enter Placement Information

Notes for Discussion:

- Placement information in SHINES replaces IDS Placement Central.
- Portions of the Placement Information page replace portions of the case plan in CPRS.

Scenario:

Ashley is placed in a foster home of Joyce Smith (6800 Shannon Parkway, Union City, GA 30291).

Getting Started: Begin these steps from the [Staff To-Do List](#) page.

| Action | Notes |
|---|---|
| 1. Click the Workload second level tab. | The Assigned Workload page displays. |
| 2. Click the Stage Name hyperlink. | Culhane, Ashley – FCC |
| | The Case Summary page displays. |
| 3. Click the Placement second level tab. | The Placement List page displays. |
| 4. Click the Add button. |  |
| | The Placement Information page displays. |
| 5. Click the calendar icon in the Start Date/Attempted Date field. |  Today's Date |
| | <p>Note for Discussion:</p> <ul style="list-style-type: none"> • All attempts to Placement Resources can be recorded. This is a required field. Use this field to enter the date you placed the child or attempted to place the child in this home or facility. • |
| 6. Complete the Time field. | 9:00am |
| | <p>Note for discussion:</p> <ul style="list-style-type: none"> ▪ System will not allow future times to be entered. |

| | |
|--|--|
| <p>7. Click the Actual/Attempted dropdown box.</p> | <p style="text-align: right;">Actual</p> <p>Note for Discussion:</p> <ul style="list-style-type: none"> This is a required field. Use this drop-down box to indicate whether this entry is in regards to an actual placement or attempted placement. |
| <p>8. Click the Placement Type dropdown box.</p> | <p style="text-align: right;">DFCS Family Foster Home</p> |
| <p>9. Select Staff button is used when the staff who actually made the placement is different from the staff entering the data.</p> | |
| <p>10. Click the Method dropdown box.</p> | <p style="text-align: right;">Announced Face to Face</p> <p>Note for Discussion:</p> <ul style="list-style-type: none"> Temporary Placement Checkbox – Select this checkbox to indicate this is a temporary placement for the child. After selecting this checkbox complete the Temporary Placement Type field. Temporary Placement Type Drop-down box – If the Temporary Placement checkbox has been selected, indicating this is a temporary placement for the child, use this drop-down box to select the type of temporary placement. Temporary Placement Comments box – Use this field to enter any additional information regarding the child’s temporary placement. |
| <p>11. Click the Select Resource button.</p> | <div style="text-align: right; margin-bottom: 10px;">  </div> <p>The Resource Search page displays.</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> All paid placement resources must be entered in Resource Directory by the RD staff prior to completing the placement information. |
| <p>12. Complete the Resource Name field.</p> | <p style="text-align: right;">Smith, Joyce</p> |

13. Click the **Search** button.

Search

The Resource Search Results page displays.

14. Click the **Resource Name** radio button.

Joyce Smith

15. Click the **Continue** button.

Continue

The Placement Information page displays.

Note for discussion:

- Waiver Required checkbox and radio buttons document if a waiver was required to place child with resource.
- Waiver should have already been completed and entered by the RD in the FAD stage prior to completing the placement information.

16. Placement Information Section

Note for discussion:

- Date Last Discharged From Last Foster Care Episode: Match %:
Field N/A for Georgia SHINES system

Click the calendar icon in the **Permanency Report Due Date** field.

1 Year from Today's Date

Note for discussion:

- Use this field to enter the due date for the next Permanency Hearing Date (one year minus a day from date of removal).
- This field was originally created to satisfy Kenny A requirements and is a mandatory field.
- Seven checkboxes listed below date are selected if applicable.
 - Medicaid and Placement Address different
 - Intended to be Permanent
 - Supervision Contracted
 - Close Family Friend
 - Sibling Group
 - Boarding County
 - Placement Services to Parents
- Boarding County fields to be completed as applicable
- Home Trial Visit information to be completed as applicable.

17. Expand the **Placement Checklist** section.



18. Complete the **Placement Checklist** fields as appropriate for the scenario.

Note for discussion:

- Fields for Siblings in Care are incorrectly formatted.
Should read: Siblings in Care:
Siblings placed with
Child:

19. Expand the **Placement Discussion** section.

| | |
|---|---|
| <p>20. Complete the Placement Discussion fields as appropriate for the scenario.</p> | <p>Note for discussion:</p> <ul style="list-style-type: none"> ▪ Date Records Provided and Discussed with Placement Resource/ICPC section to be completed and kept updated throughout placement episode. |
| <p>21. Expand Placement Removal/Refusal section</p> | <p>Note for Discussion:</p> <ul style="list-style-type: none"> • Removal Reason field refers to refusals also. Use this drop-down box to select the reason that the child was removed from or refused by the placement resource. • For training purposes, do not enter any data. • When the agency is relieved of custody of a child, the AFCARS discharge fields are completed. |
| <p>22. Expand the Address/Phone Detail section and review.</p> | <p>Note for discussion:</p> <ul style="list-style-type: none"> ▪ Verify that the address of the foster home or placement provider does populate into this area, if it does not, this could mean a problem with the resource. ▪ When validating an address, the system will enter automatically the county and zip code. ▪ This information is reviewed by Regional Accounting and they forward payment to the address listed. (ie. PO Box verses physical address) |
| <p>23. Click the Save button.</p> | <div style="text-align: center;">  </div> <p style="text-align: center;">The Placement Information page refreshes and displays the Save and Submit button.</p> |

24. Click the **Save And Submit** button.



The To-Do Detail page displays.

Notes for discussion:

- User's need to ensure that approval is directed to the appropriate approving manager. If manager needs to be changed, select Select Staff button and choose correct manager for approval to be routed to.
- User's can enter comments at this point if applicable.

25. Click the **Save** button.

The To-Do Detail page refreshes and displays a confirmation message.

Note for discussion:

- Always ensure that you receive the confirmation message to complete the routing of the submission for approval.

Attention:

- **Your data has been successfully saved to the database**

Notes for Discussion:

- SHINES allows temporary placements without closing the existing placement. In these situations, the temporary placement does not count as a move.
- Prior to entering an unpaid placement resource, be sure to have added the individual to the person list and complete the Relative Care Assessment. Payment of Care is not applicable if relative placement is unpaid.
- **Editing Placement Information that was entered incorrectly:**
 - If a placement dates are entered incorrectly and then approved. Once approved the placement record becomes read only. If there is a need to change these records for any reason, for example a child legitimately stays in a home for an additional day, then the Placement Information needs to be edited. To make an edit to the Placement Information page users will need to contact their County Director, Deputy Director or Program Administrators and have them make the changes. These people will have the ability to update the Placement Start Date, End Date, Placement Type, Resource Information and Removal Reason for a placement after it has been approved

Step 6: Approve Placement Information (Supervisory function)

Notes for Discussion:

- Continue following policy regarding review of all case information prior to approval. You can update the case as needed before approving.

Getting Started: Begin these steps from the [To-Do Detail](#) page.

| Action | Notes |
|---|--|
| 10. Click the My Tasks first level tab. | The Assigned Workload page displays. |
| 11. Click the Staff To-Do List second level tab. | The Staff To-Do List page displays. |
| 12. Click the Task hyperlink next to the GS – Approve Placement Information task. | The Placement Information page displays. Notes for discussion: <ul style="list-style-type: none">• Review all the Placement sections and expandable sections prior to approval. |
| 13. Click the Approval Status button. | The Approval Status – Approve Placement page displays. |
| 14. Complete the Password field. | Use the password provided by your instructor. Notes for discussion: <ul style="list-style-type: none">• In this field, use the password you use to log in to SHINES. |
| 15. Click the Approve button. | A confirmation message displays in a new window. Notes for discussion: <ul style="list-style-type: none">• To reject the intake, complete the Comments and Password fields and click the Reject button. |

16. Click the **Cancel** button.

The Approval Status page displays.

Notes for discussion:

- As the approver, you can require an additional approval.
- If you click the **OK** button, an additional approval is required.
- A new to-do is created. Use the **Select Staff** function to assign the to-do to the additional approver.

17. Click the **Save** button.

A rectangular button with a dark grey background and the word "Save" in white text.

The Staff To-Do List page displays.

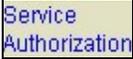
Step 7: Request Service Authorization

Notes:

Refer to online COSTAR Part 3 Manual link for UAS/Entitlement Codes (Field Fiscal Services Web Site <http://167.193.156.254/ffs/index.htm>.) This manual is continually updated to assure accuracy.

Scenario: CCFA referral completed and data entered into system for authorization.

Getting Started: Begin these steps from the [Staff To-Do Detail](#) page. Then click on the [Workload second level tab – Ashley Culhane, FCC stage hyperlink](#).

| Action | Notes |
|---|--|
| 1. Click the Service Authorization tab. |  |
| | The Service Authorization List page displays. |
| 2. Click the Add button. |  |
| | The Service Authorization and Referral Header page displays. |
| 3. Click the calendar icon in the Effective field. |  Today's Date |
| 4. Click the UAS Program dropdown box. | 511 – Comprehensive Child and Family Assessment |
| 5. Click the Entitlement Code dropdown box. | 29 – Assessments |
| 6. Payment County field automatically populates to the County initiating the service authorization. | Note for discussion: <ul style="list-style-type: none"> ▪ If the situation involves more than one county, adjust county fields accordingly. |
| 7. Click the Select Resource button. |  |
| | The Resource Search Results page displays. |
| 8. Click the Resource Name radio button. |  Family Counseling Center |

9. Click the **Continue** button.

Continue

The Service Authorization and Referral Header page displays.

Notes for discussion:

- The system will allow for policy waiver documentation. The waiver must be entered prior to selecting the waiver on the service authorization page.
- This would be completed under the Case Management 2nd level tab.

10. Click the **Primary Client for Delivery of Services** dropdown box.

Culhane, Ashley

11. Enter **Date Referral Sent** field

Today's date

Enter **Reason for Referral** comments

CCFA assessment

Note for discussion:

- Preferred subcontractor field to be used to document a specific provider staff.

12. Click the **Save** button.

Save

The Service Authorization and Referral Header page refreshes and displays additional sections.

Note for discussion:

- **PUP and Outcome Information** section N/A for Foster Care as it relates to Early Intervention services.

13. Expand the **Service Authorization List** section.

14. Click the **Add** button.

Add

The Service Authorization Detail page displays.

| | |
|---|---|
| <p>15. Click the Service Description dropdown box.</p> | <p>51129e – Family Assessment – 1st Child</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> All selections from the dropdown box relates to the contract entered by the Regional Resource Maintainer. |
| <p>16. Click the Authorization Type button.</p> | <p>Initial</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> The data base has the contract coded incorrectly. Workers would normally select One –Time as the type. Initial type refers to a reoccurring type of payment. |
| <p>17. Click the calendar icon in the Begin field. (populated)</p> | <p> Today's Date</p> |
| <p>18. Click the calendar icon in the End field.</p> | <p> Thirty days from date of CCFA referral</p> |
| <p>19. Click the Period dropdown box.</p> | <p>Month</p> |
| <p>20. Complete the Frequency field.</p> | <p>1</p> |
| <p>21. Complete the Requested Units field.</p> | <p>1.00</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> Must be in format of X.00 |
| <p>22. Unit Rate and Amount fields are automatically calculated based on the Contract information provided by the Regional Resource Maintainer.</p> | |
| <p>23. Click the Person(s) checkbox.</p> | <p><input checked="" type="checkbox"/> Culhane, Ashley</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> Always select the person for whom the service is directly being provided for. |
| <p>24. Referral and Quality of Service section is used only when a Service Authorization is terminated.</p> | |

25. Click the **Save** button.



The Service Authorization and Referral Header page displays.

26. Click the **Save and Submit** button.



The To-Do Detail page displays.

Notes for discussion:

- User's need to ensure that approval is directed to the appropriate approving manager. If manager needs to be changed, select Select Staff button and choose correct manager for approval to be routed to.
- User's can enter comments at this point if applicable.

27. Click the **Save** button.



The To-Do Detail page refreshes and displays a confirmation message.

Note for discussion:

- Always ensure that you receive the confirmation message to complete the routing of the submission for approval.

Attention:

- **Your data has been successfully saved to the database**

Notes for Discussion:

- To change an approved service authorization, terminate the service authorization and create a new one.
- If more than one stage is opened at the time, the Service Authorization has to be entered in the last stage. (ie. INV or ONG and FCC stages opened at same time. The CPS Investigator/FPS needs to complete a Service Authorization in the FCC stage.)
- There is an excellent Job Aid located under the Financial link in Online Help.

Step 8: Approve Service Authorization (Supervisory function)

Notes for Discussion:

- Continue following policy regarding review of all case information prior to approval. You can update the case as needed before approving.

Getting Started: Begin these steps from the [To-Do Detail](#) page.

| Action | Notes |
|---|--|
| 10. Click the My Tasks first level tab. | The Assigned Workload page displays. |
| 11. Click the Staff To-Do List second level tab. | The Staff To-Do List page displays. |
| 12. Click the Task hyperlink next to the GS – Approve Service Authorization task. | The Service Authorization and Referral Header page displays. Notes for discussion: <ul style="list-style-type: none">• Review all the Service Authorization sections and expandable sections prior to approval. |
| 13. Click the Approval Status button. | The Approval Status – Approve Service Authorization page displays. |
| 14. Complete the Password field. | Use the password provided by your instructor. Notes for discussion: <ul style="list-style-type: none">• In this field, use the password you use to log in to SHINES. |
| 15. Click the Approve button. | A confirmation message displays in a new window. Notes for discussion: <ul style="list-style-type: none">• To reject the intake, complete the Comments and Password fields and click the Reject button. |

16. Click the **Cancel** button.

The Approval Status page displays.

Notes for discussion:

- As the approver, you can require an additional approval.
- If you click the **OK** button, an additional approval is required.
- A new to-do is created. Use the **Select Staff** function to assign the to-do to the additional approver.

17. Click the **Save** button.

A rectangular button with a dark grey background and the word "Save" in white text.

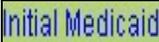
The Staff To-Do List page displays.

Step 9: Initial Medicaid Application

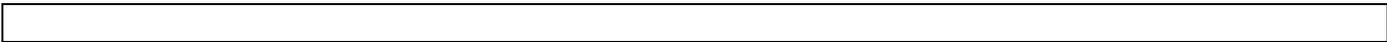
Notes for Discussion:

- The Initial Medicaid Application page in SHINES replaces Form 223.
- Verify that the child and parent(s) have a CRS ID before submitting.

Getting Started: Begin these steps from the [Staff To-Do List](#) page. Click on the [Workload](#) second level tab then click on the [Ashley Culhane FCC](#) stage name hyperlink.

| Action | Notes |
|--|---|
| 1. Click the Foster Care Eligibility second level tab. |  <p>The Eligibility Summary List page displays.</p> <p>Notes for discussion:</p> <ul style="list-style-type: none">▪ The Eligibility Summary List will display data received after MES completes the IV-E application. |
| 2. Click the Medicaid Application third level tab. |  <p>The Initial Medicaid Application page displays.</p> |
| 3. Child Information section to be reviewed for accuracy. | <p>Note for discussion:</p> <ul style="list-style-type: none">▪ If corrections are required to this section, click the Detail button and the system will take you directly to the person detail page. Complete the data corrections and return to the Foster Care Eligibility second level tab. |
| 4. Click the Parent? Checkbox for each mother and father of child. |  <p>Note for discussion:</p> <ul style="list-style-type: none">• If errors are found on this section, click the name hyperlink and the system will return you to the person detail page to make the corrections. Return to the Medicaid application by clicking on the Foster Care Eligibility second level tab. |

| | |
|---|--|
| 5. Click the Has Child Support been ordered in the juvenile court radio button. | <input type="radio"/> No |
| 6. Click the Was medical assistance needed for the child prior to removal radio button. | <input type="radio"/> No |
| 7. Income and Resources for Child sections should list data entered on the child's person detail page. | Note for discussion: <ul style="list-style-type: none"> • If corrections are needed, return to child's person detail page and enter data. |
| 8. Click the Is the child covered by any health insurance other than Medicaid radio button. | <input type="radio"/> No Note for discussion: <ul style="list-style-type: none"> • If yes, complete additional fields. |
| 9. Click the Case Manager Signature checkbox. | Note for discussion: <ul style="list-style-type: none"> • Review information regarding compliance with electronic submission procedures and completion of the Medicaid application. |
| 10. Click the Sign Now button. | The Initial Medicaid Application page refreshes with the Case Manager's name and date signed. |
| 11. Click the Save and Submit button. | <div data-bbox="1052 1178 1235 1230" style="border: 1px solid black; padding: 2px; display: inline-block; margin-bottom: 10px;">Save and Submit</div> <p>The application information is saved and routed to the Medicaid Eligibility Specialist.</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> • Users will not get the typical confirmation message as this is directed automatically to Rev Max. • If application is not complete, user's can select Save button instead and continue working on the application. |
| Notes for Discussion: <ul style="list-style-type: none"> • Once the application is submitted to Rev Max (MES), a Task is received by Rev Max. Then a MES is assigned the case as a secondary worker by Rev Max to complete the process. • The application needs to be completed for each child in a real case. | |



Step 10: Complete IV-E Application

Notes for Discussion:

- The IV-E Application pages in SHINES replace Forms 223 and 224.
- When the FCC and FCF stages were generated, the system also generates a Foster Care Application.
- The application includes five pages that the system will guide you through:
 - Application/Background
 - Age/Citizen
 - Deprivation
 - Health Insurance
 - Income/Expenditures

Getting Started: Begin these steps from the [Initial Medicaid Application](#) page.
FCC STAGE

| Action | Notes |
|--|---|
| 1. Click the Foster Care Eligibility second level tab. | The Eligibility Summary List page displays. |
| 2. Click the IV-E Application/NOC third level tab. | <div data-bbox="1068 978 1221 1024" style="border: 1px solid black; padding: 2px; display: inline-block;">Application</div> <p>The Foster Care Application List page displays.</p> <p>Note for discussion:</p> <ul style="list-style-type: none">• NOC refers to Notification of Change |

3. Click the **Type** hyperlink.

Foster Care Application

The Application and Background page displays.

Notes for Discussion:

A message will display as follows as a reminder of actions needed.

- Please ensure the following has been completed prior to entering or saving data, otherwise your data will not be saved:
 - Child's relationship must be 'Self' on Person Detail page
 - Indicate if child has been adopted on Person Characteristics page
 - CRS ID must be obtained from Person Identifiers Detail page
 - Child Citizenship and Mother Marital Status must be completed on Citizenship and Identity page

4. The system defaults the radio button to Initial application. If there is a change to be made after submitting the initial application, users will return to the application and select the radio button for notification of change.

5. **Child Information** section to be reviewed for accuracy.

Note for discussion:

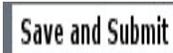
- If corrections are required to this section, click the **Detail** button and the system will take you directly to the person detail page. Complete the data corrections and return to the Foster Care Eligibility second level tab.

| | |
|--|---|
| <p>6. Review the Address of Home of Removal section</p> | <p style="text-align: right;">123 Neglect Way Atlanta, GA 30309</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> ▪ Address does populate from person detail if Removal home is checked on a primary address ▪ This should be the address of primary caretaker's residents at the time of removal. |
| <p>7. Click all the Living in Home of Removal checkboxes that apply.</p> | <ul style="list-style-type: none"> <input type="checkbox"/> Culhane, Ashley <input type="checkbox"/> Culhane, Heather <input type="checkbox"/> Culhane, Marcie <input type="checkbox"/> Avers, Murray <p>Notes for discussion:</p> <ul style="list-style-type: none"> • Refers back to AFDC deprivation policy. • If errors are found on this section, click the name hyperlink and the system will return you to the person detail page to make the corrections. Return to the IV-E Application by clicking on the Foster Care Eligibility second level tab. |
| <p>8. Click the Does the child live with a minor parent who is in DFCS custody radio button.</p> | <p style="text-align: right;"><input type="radio"/> No</p> |
| <p>9. Click the Was the child in a hospital when DFCS obtained custody radio button.</p> | <p style="text-align: right;"><input type="radio"/> No</p> |
| <p>10. Click the Was medical assistance needed for the child within the 3 months prior to removal radio button.</p> | <p style="text-align: right;"><input type="radio"/> No</p> |
| <p>11. Expand the Placements section.</p> | <p>Review the placement information.</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> • Rev Max reviews this information to determine if child is placed in an approved IV-E placement. |

| | |
|---|--|
| <p>12. Click the Save button.</p> | <div style="text-align: right;"><input type="button" value="Save"/></div> <p>The Age and Citizenship page displays.</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> • This section should already be completed by entering information in the Citizenship and Identity third level tab under Person second level tab. • The Verified by Eligibility Specialist and Evaluative Conclusion sections are to be completed by MES. |
| <p>13. Click the Save button after review of Age/Citizenship page.</p> | <p>The Removal Household and Deprivation page displays.</p> |
| <p>14. Click the Month dropdown box.</p> | <p style="text-align: right;">Month of Removal</p> |
| <p>15. Complete the Year field.</p> | <p style="text-align: right;">Year of Removal</p> |
| <p>16. Click the Specify the child’s living arrangement during the month the court proceedings were initiated radio button.</p> | <p style="text-align: right;">Living With One Legal or Biological Parent</p> |
| <p>17. Click the Which Parent radio button.</p> | <p style="text-align: right;"><input checked="" type="radio"/> Mother</p> |
| <p>18. Click the Is the other parent’s absence because of employment outside the community or active military duty radio button.</p> | <p style="text-align: right;"><input checked="" type="radio"/> No</p> |
| <p>19. Click the What is the reason for the parent’s absence checkbox.</p> | <p style="text-align: right;"><input type="checkbox"/> Never lived in the home</p> |
| <p>20. Click the Save button.</p> | <div style="text-align: right;"><input type="button" value="Save"/></div> <p>The 3rd Party Health Insurance Detail page displays.</p> |
| <p>21. Click the Is the child covered by any health insurance other than Medicaid radio button.</p> | <p style="text-align: right;"><input checked="" type="radio"/> No</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> • If answer is yes, complete applicable fields. |

| | |
|---|---|
| 22. Click the Save button. | <div style="text-align: right; border: 1px solid black; padding: 2px 10px; display: inline-block;">Save</div> <p style="text-align: right;">The Income and Expenditures page displays.</p> |
| 23. Click the Did the child receive Income Assistance during that month radio button. | <input type="radio"/> No |
| 24. Income for Child and Family sections should list data entered in each person's person detail page. | |
| 25. Complete the If the family has \$0 monthly income... field. | Mother was working at the time of removal. See Income information. |
| 26. Complete the Specify how the family's and child's income(s) were determined field. | Statement from the mother. |
| 27. Resources for Child and Family sections should list data entered in each person's person detail page. In the Resources for Family section, click the Does the household have \$10,000 or more equity in property and accessible resources radio button. | <input type="radio"/> No |
| 28. Click the Does anyone working in the removal home, pay for child care or for the care of a disabled adult living in the removal home radio button. | <input type="radio"/> No Note for Discussion: <ul style="list-style-type: none"> • If yes, complete additional fields as applicable. |
| 29. Expand the Documentation Checklist section. | Note for Discussion: <ul style="list-style-type: none"> ▪ Any documentation can be entered into the external documentation and the MES will have access. |
| 30. Click the Is the proof of birth/child's age being sent to the Eligibility Specialist radio button. | Yes |
| 31. Click the calendar icon under the Is the proof of birth/child's age being sent to the Eligibility Specialist field. | Today's Date |
| 32. Complete the Comments field. | Birth Certificate |

| | | |
|-----|--|---|
| 33. | Click the Are copies of all documents used to verify the child's Citizenship/Alien Status being sent to the Eligibility Specialist radio button. | Yes |
| 34. | Click the calendar icon under the Are copies of all documents used to verify the child's Citizenship/Alien Status being sent to the Eligibility Specialist field. | Today's Date |
| 35. | Complete the Comments field. | Birth Certificate |
| 36. | Click the Are copies of all documents used to verify the child's Identity being provided to the Eligibility Specialist radio button. | Yes |
| 37. | Click the calendar icon under the Are copies of all documents used to verify the child's Identity being provided to the Eligibility Specialist field. | Today's Date |
| 38. | Complete the Comments field. | Birth Certificate |
| 39. | Click the Have all legal documents been sent to the Eligibility Specialist including the Affidavit, Petition, and Court Order radio button. | No |
| 40. | Click the calendar icon under the Have all legal documents been sent to the Eligibility Specialist including the Affidavit, Petition, and Court Order field. | Today's Date |
| 41. | Complete the Comments field. | Shelter Care Order in case record and faxed to Rev Max Specialist. |
| 42. | Click the Are copies of all documents used to verify the child's pregnancy being provided to the Eligibility Specialist radio button. | No |

| | |
|--|---|
| 43. Click the calendar icon under the Are copies of all documents used to verify the child’s pregnancy being provided to the Eligibility Specialist field. | Today’s Date |
| 44. Complete the Comments field. | NA |
| 45. Click the Was child support court ordered radio button. | <input type="radio"/> No |
| 46. Enter Comments if applicable. | |
| 47. Click the Save and Submit button. |  |
| <p>The Foster Care Application List page displays.</p> <p>Notes for discussion:</p> <ul style="list-style-type: none"> • The application is routed directly to the Medicaid Eligibility Specialist. • If application is still in processing status, click Save to continue data entry. | |
| <p>Note for Discussion:</p> <ul style="list-style-type: none"> • The application needs to be completed for each child’s FCC stage in a real case. • If an error message displays regarding Living Arrangements does not match Person’s selected as Living in home at time of removal, user must ensure that the child and all caregivers who lived in the home at time of removal’s relationship code under each Person Detail have been updated. (ie. Child as Self and Primary Caregiver as Parent). Then go back to FC Application and Save and Submit. • Make sure all Income/Resources were updated on the appropriate Person Detail pages so they populate over correctly to the Eligibility Application. • SAVE system stands for Systematic Alien Verification Entitlement. • The Initial, IV-E and IV-B status notification will be sent directly from MES to Financial. Case managers will no longer be responsible to notify Financial to make changes. These procedures replace the Form 529. • When MES completes the determination for IV-E, results will be displayed on the Eligibility Summary page. • The status codes on the Foster Care Application List page will assist users to determine if application is still pending or approved. • Editing an Eligibility Summary page can be done if a case manager or supervisor discovers an error on any of these fields then they will need to contact the MES supervisor that is working on the case to have these fields edited. This only to be done if the determination was documented in error. | |

Redeterminations:

- The SSCM is notified that the re-determination will be due in 30 days.
- If the child has already had a determination done in SHINES using the 5 pages of the FCEA and Rev Max has completed a new Eligibility Summary page, then the re-determination will be done on the Re-Determination tab in SHINES
- If there was never a determination done in SHINES, SSCM initiates re-determination process in SHINES by completing information in the IV-E Application (FCEA).
- The SSCM adds/modifies information already in SHINES regarding the child's current situation in Person Detail unless it is a notification of change, then it is done in the FCEA..
- Eligibility staff has access to this data and use it to re-determine eligibility in SHINES.

Step 11: Enter Foster Child Family Stage

Getting Started: Begin these steps from the [Foster Care Application List](#) page.

| Action | Notes |
|---|--|
| 1. Click the Case Summary second level tab. | The Case Summary page displays. |
| 2. Click the Stage Name radio button. | #04Culhane, Marcie – FCF |
| 3. Click the Select Stage button. | The Case Summary page refreshes and displays a confirmation message. |

Step 12: Record Family Team Meeting

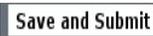
Getting Started: Begin these steps from the [Case Summary](#) page.

Note for discussion:

Although some Team Meetings/Reviews can be documented in the FCC stages, the only place where an FTM is listed as an option is in the FCF stage.

| Action | Notes |
|--|---|
| 1. Click the Family Plans second level tab under the FCF stage. | The Foster Care Case Plan Family List page displays. |
| 2. Click the Team Meeting/Reviews third level tab. |  The Team Meetings/Reviews List page displays. |
| 3. Click the Add button. |  The Team Meetings/Reviews page displays. |
| 4. Click the Meeting Type dropdown box. | FTM |
| 5. Click the calendar icon in the Meeting Date field. |  Today's Date |
| 6. Complete the Start Time field. | 10:00am |
| 7. Click the Save button. |  The Team Meetings/Reviews page refreshes and displays additional fields. |
| 8. Click the calendar icon in the Preparation Interview field. |  Today's Date |
| 9. Click the Save button. |  The meeting information is saved. |
| 10. In the Participation section, click the Add button. |  The Team Meetings/Reviews Participant Detail page displays. |
| 11. Click the Participant Type dropdown box. | Person in Case |

| | |
|---|--|
| <p>12. Click the Continue button.</p> | <div style="text-align: right;"></div> <p>The Team Meetings/Reviews Participant Detail page refreshes and displays additional fields.</p> |
| <p>13. Click the Select Person button.</p> | <div style="text-align: right;"></div> <p>The Person List page displays.</p> |
| <p>14. Click the Name radio button.</p> | <div style="text-align: right;"><input checked="" type="radio"/> Culhane, Marcie</div> |
| <p>15. Click the Continue button.</p> | <div style="text-align: right;"></div> <p>The Team Meetings/Reviews Participant Detail page displays.</p> <p>Notes for discussion:</p> <ul style="list-style-type: none"> • Enter additional fields as applicable. |
| <p>16. Click the Save button.</p> | <div style="text-align: right;"></div> <p>The Team Meetings/Reviews page displays.</p> <p>For training purposes:</p> <ul style="list-style-type: none"> • Add a Staff person and Other to the participation list. • Other refers to someone who attended the meeting but is not listed on the person list for the case. |
| <p>17. Click the Save button.</p> | <div style="text-align: right;"></div> <p>The meeting information is saved.</p> |
| <p>18. Click the Narrative button.</p> | <div style="text-align: right;"></div> <p>The Team Meeting/Review Narrative page displays in a new window.</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> ▪ FTM facilitator’s documentation can be copied and pasted into the Narrative. |
| <p>19. Complete the Comments regarding meeting (including MDT, FTM, etc.) field.</p> | <p>The needs of the family were discussed for risk reduction.</p> |

| | |
|--|---|
| 20. Complete the Recommendations for child (from MDT, FTM, etc.) field. | Ashley will participate in individual therapy to address separation from her family. |
| 21. Complete the Recommendations for parents (from MDT, FTM, etc.) field. | Psychological Evaluation Parenting Education Substance Abuse Evaluation Drug treatment program Mom needs have regular visitation with child |
| 22. Click the Disk icon. | The narrative information is saved. |
| 23. Click the Close button. |  The Team Meetings/Reviews page displays. |
| 24. Click the Save and Submit button. |  The To-Do Detail page displays. Notes for discussion: <ul style="list-style-type: none"> ▪ User's need to ensure that approval is directed to the appropriate approving manager. If manager needs to be changed, select Select Staff button and choose correct manager for approval to be routed to. ▪ User's can enter comments at this point if applicable. |
| 25. Click the Save button. |  The To-Do Detail page refreshes and displays a confirmation message. Note for discussion: <ul style="list-style-type: none"> ▪ Always ensure that you receive the confirmation message to complete the routing of the submission for approval. Attention: • Your data has been successfully saved to the database |

Step 13: Approve Family Team Meeting (Supervisory function)

Notes for Discussion:

- Continue following policy regarding review of all case information prior to approval. You can update the case as needed before approving.

Getting Started: Begin these steps from the [To-Do Detail](#) page.

| | Action | Notes |
|-----|---|--|
| 18. | Click the My Tasks first level tab. | The Assigned Workload page displays. |
| 19. | Click the Staff To-Do List second level tab. | The Staff To-Do List page displays. |
| 20. | Click the Task hyperlink next to the GS – Approve Team Meetings/Reviews task. | The Team Meetings/Reviews page displays. Notes for discussion: <ul style="list-style-type: none">• Review all the sections, expandable sections and narrative prior to approval. |
| 21. | Click the Approval Status button. | The Approval Status – Approve Team Meetings/Reviews page displays. |
| 22. | Complete the Password field. | Use the password provided by your instructor. Notes for discussion: <ul style="list-style-type: none">• In this field, use the password you use to log in to SHINES. |
| 23. | Click the Approve button. | A confirmation message displays in a new window. Notes for discussion: <ul style="list-style-type: none">• To reject the intake, complete the Comments and Password fields and click the Reject button. |

24. Click the **Cancel** button.

The Approval Status page displays.

Notes for discussion:

- As the approver, you can require an additional approval.
- If you click the **OK** button, an additional approval is required.
- A new to-do is created. Use the **Select Staff** function to assign the to-do to the additional approver.

25. Click the **Save** button.

A rectangular button with a dark grey background and the word "Save" in white text.

The Staff To-Do List page displays.

Step 14: Record MDT

Note for Discussion: Follow similar procedures as documenting the FTM.

Getting Started: Begin these steps from the [Staff To-Do List](#) page. Then click on [Workload](#) second level tab – [Marcie Culhane#04-FCF](#) hyperlink – [Family Plan](#) third level tab.

| Action | Notes |
|--|---|
| 1. Click the Team Meeting/Reviews third level tab under FCF stage. |  The Team Meetings/Reviews List page displays. |
| 2. Click the Add button. |  The Team Meetings/Reviews page displays. |
| 3. Click the Meeting Type dropdown box. | MDT |
| 4. Click the calendar icon in the Meeting Date field. |  Today's Date |
| 5. Complete the Start Time field. | 9:00am |
| 6. Click the Save button. |  The Team Meetings/Reviews page refreshes and displays additional fields. |
| 7. Click the MDT Meeting Regarding checkboxes. | Permanency Safety Wellbeing Note for Discussion: <ul style="list-style-type: none">• The checkbox selections include all three goals of ASFA. Check all that apply. |
| 8. Click the Save button. |  The meeting information is saved. |
| 9. Click the Add button for the Participant listing. |  The Team Meetings/Reviews Participant Detail page displays. |

| | | |
|-----|--|---|
| 10. | Click the Participant Type dropdown box. | Staff |
| 11. | Click the Continue button. |  The Team Meetings/Reviews Participant Detail page displays. |
| 12. | Click the Select Staff button. | The Staff Search page displays. |
| 13. | Complete the Last field. | Smallwood |
| 14. | Click the Search button. | The Staff Search page refreshes and displays the search results. |
| 15. | Click the Name radio button. | Smallwood, Glenn |
| 16. | Click the Continue button. | The Team Meetings/Reviews Participant Detail page displays. Notes for discussion: <ul style="list-style-type: none"> • If you select the Participant Type of Other, you can enter a name and relationship. This is not restricted to people in the case. |
| 17. | Click the Save button. |  The Team Meetings/Reviews page displays. For training purposes: <ul style="list-style-type: none"> ▪ Enter a Person in Case and Other to the list. |
| 18. | Click the Narrative button. |  The Team Meeting/Review Narrative page displays in a new window. |
| 19. | Complete the Comments regarding meeting (including MDT, FTM, etc.) field. | The needs of the family and child were discussed for reunification. |
| 20. | Complete the Recommendations for child (from MDT, FTM, etc.) field. | Ashley will participate in individual therapy to address separation from her family. She will also participate in Family therapy with her mother to build their relationship and communications. |

21. Complete the **Recommendations for parents (from MDT, FTM, etc.)** field.

**Parenting education classes
Drug screens
Drug treatment program
Mom needs to bond with child**

22. Click the **Disk** icon.

The narrative information is saved.

23. Click the **Close** button.



The Team Meetings/Reviews page displays.

24. Click the **Save and Submit** button.



The To-Do Detail page displays.

Notes for discussion:

- User's need to ensure that approval is directed to the appropriate approving manager. If manager needs to be changed, select Select Staff button and choose correct manager for approval to be routed to.
- User's can enter comments at this point if applicable.

25. Click the **Save** button.



The To-Do Detail page refreshes and displays a confirmation message.

Note for discussion:

- Always ensure that you receive the confirmation message to complete the routing of the submission for approval.

Attention:

- **Your data has been successfully saved to the database**

Trainer Notes:

- **Ask** if there are any questions before continuing.

Step 15: Approve MDT (Supervisory function)

Notes for Discussion:

- Continue following policy regarding review of all case information prior to approval. You can update the case as needed before approving.

Getting Started: Begin these steps from the [To-Do Detail](#) page.

| Action | Notes |
|---|--|
| 26. Click the My Tasks first level tab. | The Assigned Workload page displays. |
| 27. Click the Staff To-Do List second level tab. | The Staff To-Do List page displays. |
| 28. Click the Task hyperlink next to the GS – Approve Team Meetings/Reviews task. | The Team Meetings/Reviews page displays. Notes for discussion: <ul style="list-style-type: none">• Review all the sections, expandable sections and narrative prior to approval. |
| 29. Click the Approval Status button. | The Approval Status – Approve Team Meetings/Reviews page displays. |
| 30. Complete the Password field. | Use the password provided by your instructor. Notes for discussion: <ul style="list-style-type: none">• In this field, use the password you use to log in to SHINES. |
| 31. Click the Approve button. | A confirmation message displays in a new window. Notes for discussion: <ul style="list-style-type: none">• To reject the intake, complete the Comments and Password fields and click the Reject button. |

32. Click the **Cancel** button.

The Approval Status page displays.

Notes for discussion:

- As the approver, you can require an additional approval.
- If you click the **OK** button, an additional approval is required.
- A new to-do is created. Use the **Select Staff** function to assign the to-do to the additional approver.

33. Click the **Save** button.

A rectangular button with a dark grey background and the word "Save" in white text.

The Staff To-Do List page displays.

Step 16: Enter the FCC Stage and Record CCFA Recommendations

Notes for Discussion:

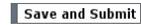
- The Needs and Outcomes page in SHINES adds a layer of accountability for the case manager.
- This action captures CCFA and Agency recommendations.

Getting Started: Begin these steps from the [Staff To-Do List](#) page. Click on [Workload](#) second level tab [#04Culhane, Ashley– FCC](#) stage name hyperlink.

| Action | Notes |
|--|--|
| 1. Click the Child Plans second level tab. | The Foster Care Case Plan Child List page displays. |
| 2. Click the Needs and Outcomes third level tab. |  The Needs and Outcomes page displays. |
| 3. In the Needs And Outcomes List section, click the Add button. |  The Needs and Outcomes Detail page displays. |
| 4. Complete the Identified Need field. | Ongoing supervision of child |
| 5. Click the CCFA Need checkbox. | Note for Discussion: <ul style="list-style-type: none"> • If need is not listed in the CCFA, do not check as it would reflect an agency recommendation. |
| 6. Complete the Service Recommended field. | Parenting Classes |
| 7. Click the Service Provided checkbox. | Note for discussion: <ul style="list-style-type: none"> ▪ By clicking both the Services Provided and Need Met checkboxes, no explanations needed. If checkboxes are not selected, an explanation is required. |
| 8. Complete the Why Need was not met field. | This is a newly identified need |
| 9. Click the Save button. |  The Needs and Outcomes page displays. |

| | | |
|-----|---|---|
| 10. | Click the Select Resource button. |  |
| | The Resource Search page displays. | |
| 11. | Complete Resource Type field. | Provider |
| 12. | Complete the Resource Name field. | Family Counseling Center |
| 13. | Click the Search button. | The Resource Search Results page displays. |
| 14. | Click the Resource Name radio button. |  Family Counseling Center |
| 15. | Click the Continue button. |  |
| | The Needs and Outcomes page displays. | |
| 16. | Click the CCFA Agency checkbox. | Note for discussion: <ul style="list-style-type: none"> ▪ The checkbox alerts the system that this is a CCFA Agency for tracking purposes. |
| 17. | Complete the Assessor Name field. | Tangela Nichols |
| 18. | Complete the Assessor Title field. | CCFA Assessor |
| 19. | Click the calendar icon in the Referral Date field. |  Today's Date |
| 20. | Click the calendar icon in the Assessment Completion Date field. |  Today's Date |
| 21. | Complete the General Recommendations field. | Parenting Classes |
| 22. | Complete the Placement Recommendations field. | Foster Care |
| 23. | Click the Has the CCFA Educational Assessment been performed radio button. | Yes |
| 24. | Click the calendar icon in the Date of CCFA Educational Assessment field. |  Today's Date |
| 25. | Complete the If no, explain field. | Note for discussion: <ul style="list-style-type: none"> ▪ Enter date of educational assessment if applicable. |

26. Click the **Save and Submit** button.



The To-Do Detail page displays.

Notes for discussion:

- User's need to ensure that approval is directed to the appropriate approving manager. If manager needs to be changed, select Select Staff button and choose correct manager for approval to be routed to.
- User's can enter comments at this point if applicable.

27. Click the **Save** button.



The To-Do Detail page refreshes and displays a confirmation message.

Note for discussion:

- Always ensure that you receive the confirmation message to complete the routing of the submission for approval.

Attention:

- **Your data has been successfully saved to the database**

Step 17: Approve CCFA Recommendations Needs and Outcomes (Supervisory function)

Notes for Discussion:

- Continue following policy regarding review of all case information prior to approval. You can update the case as needed before approving.

Getting Started: Begin these steps from the [To-Do Detail](#) page.

| Action | Notes |
|---|---|
| 1. Click the My Tasks first level tab. | The Assigned Workload page displays. |
| 2. Click the Staff To-Do List second level tab. | The Staff To-Do List page displays. |
| 3. Click the Task hyperlink next to the GS – Approve Needs and Outcomes task. | <p>The Needs and Outcomes page displays.</p> <p>Notes for discussion:</p> <ul style="list-style-type: none"> • Review all the sections, expandable sections and narrative prior to approval. |
| 4. Click the Approval Status button. | The Approval Status – Approve Needs and Outcomes page displays. |
| 5. Complete the Password field. | <p>Use the password provided by your instructor.</p> <p>Notes for discussion:</p> <ul style="list-style-type: none"> • In this field, use the password you use to log in to SHINES. |
| 6. Click the Approve button. | <p>A confirmation message displays in a new window.</p> <p>Notes for discussion:</p> <ul style="list-style-type: none"> • To reject the intake, complete the Comments and Password fields and click the Reject button. |

7. Click the **Cancel** button.

The Approval Status page displays.

Notes for discussion:

- As the approver, you can require an additional approval.
- If you click the **OK** button, an additional approval is required.
- A new to-do is created. Use the **Select Staff** function to assign the to-do to the additional approver.

8. Click the **Save** button.

A rectangular button with a dark grey background and the word "Save" in white text.

The Staff To-Do List page displays.

Step 18: Record Child Plan

Notes for Discussion:

- The child plan pages in SHINES replace child plan pages in CPRS.

Scenario: The family and agency has developed a Reunification Case Plan.

Getting Started: Begin these steps from the [Staff To Do List](#) page. Then click on [Workload](#) second level tab [#04Culhane, Ashley– FCC](#) stage name hyperlink.

| Action | Notes |
|--|---|
| 1. Click the Child Plans second level tab. |  <p>The Foster Care Case Plan Child List page displays.</p> |
| 2. Click the Add button. |  <p>The Foster Care Case Plan Child Detail page displays.</p> |
| 3. Complete the Describe DFCS reasonable efforts to prevent removal (services offered and provided) field. | Mother sent to substance abuse program and parenting classes. |
| 4. Click the Diligent Search Completed in 60 days radio button. | <p><input type="radio"/> No</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> If yes, enter completion date. |
| 5. Click the Is child adjusting in care radio button. | <p><input checked="" type="radio"/> Yes</p> |
| 6. Click the Save button. |  <p>The case plan information is saved.</p> |
| 7. Expand the DFCS Standard Goals section. | |

| | |
|---|--|
| <p>8. Click the Add button.</p> | <div style="text-align: right;">Add</div> <p>The Foster Care Goal/Step Detail page displays.</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> A populated Goal displays. Follow documentation standards to edit this goal to meet the requirements. |
| <p>9. Choose a Step section, click the Selected checkbox.</p> | |
| <p>10. Complete the Responsibility field.</p> | <div style="text-align: right;">DFCS</div> |
| <p>11. Complete the Step field.</p> | <p style="text-align: center;">The agency will provide transportation to medical, psychological and dental appointments for Ashley.</p> <p>Note for Discussion:</p> <ul style="list-style-type: none"> Make necessary changes to generic goals to comply with documentation standards. |
| <p>12. Click the Status dropdown box.</p> | <div style="text-align: right;">New</div> |
| <p>13. Click the calendar icon in the Anticipated Completion field.</p> | <div style="text-align: right;">  6 Months from Today's Date </div> |
| <p>14. Select all appropriate steps required and repeat procedures in steps 9-13. If user needs to create a step from scratch, select the add button and a blank step field will display.</p> | |
| <p>15. Click the Save button.</p> | <div style="text-align: right;">Save</div> <p>The Foster Care Case Plan Child Detail page displays.</p> |
| <p>16. Expand the Child Case Plan Topics section.</p> | |
| <p>17. Expand the ASFA Regs section. No action necessary for the scenario.</p> | <div style="text-align: right;">ASFA Regs</div> |
| <p>18. Expand the Health Status section.</p> | |

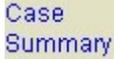
| | |
|--|---|
| <p>19. Complete the Health Status fields as appropriate for the scenario.</p> | <p>Note for Discussion:</p> <ul style="list-style-type: none"> ▪ Health Status questions on Child Plan refer to Health Log data on Person detail page. |
| <p>20. Expand Education section</p> | <p>Note for discussion:</p> <ul style="list-style-type: none"> • Review for accuracy. If corrections required, click Add to enter data. |
| <p>21. Click the Save button.</p> | <div style="text-align: right;">  </div> <p>The child plan information is saved.</p> |
| <p>22. Click the Complete? button.</p> | <p>The Foster Care Case Plan Child List page displays.</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> • The Complete? Button must be selected in order for the child plan to populate into the Family Plan. • Review the status on the Foster Care Case Plan Child List to ensure coding is COMP. |
| <p>Note for Discussion:</p> <ul style="list-style-type: none"> • If more than one child in care, the child plan portion must be completed in each separate FCC stage. Workers can copy Child Plans from one FCC to another. • To Copy Ashley's Child Plan to Heather's FCC stage complete the following steps: Complete the Child Plan in Ashley's case. Go to the case summary and get back into Heather's FCC stage. Go to the "Child Plans for Case" 3rd level under the child plans tab. Click the radio button next the plan that was done for Ashley and then hit the copy button. Make changes that apply to Heather, etc... save/complete and then you have saved the modified plan for Heather in Heather's FCC stage. You can click the Child Plans tab and see that it is now there. | |

Step 19: Enter the FCF Stage and Record Family Plan

Notes for Discussion:

- The Family Plan pages in SHINES replace the Family Plan pages in CPRS.

Getting Started: Begin these steps from the [Foster Care Case Plan Child List](#) page.

| Action | Notes |
|--|---|
| 1. Click the Case Summary second level tab. |  <p>The Case Summary page displays.</p> |
| 2. Click the Stage Name radio button. |  Culhane, Marcie – FCF |
| 3. Click the Select Stage button. | The Case Summary page refreshes and displays a confirmation message. |
| 4. Click the Family Plans second level tab. |  <p>The Foster Care Case Plan Family List page displays.</p> |
| 5. Click the Add button. |  <p>The Foster Care Case Plan Family Detail page displays.</p> |
| 6. Click the Permanency Plan Type dropdown box. | Reunification |
| 7. Click the Continue button. |  <p>The Foster Care Case Plan Family Detail page refreshes and displays additional fields.</p> |
| 8. Complete the Assigned Judge field. | William Tolbert |

9. Select the checkboxes in the **Principals on the Plan section** that are caregivers related to the plan.

Marcie Culhane
Ashley Culhane
Heather Culhane

Note for discussion:

- Only check the principals that apply to the plan. For example, there may be a mother and father listed but each have separate case plans. Select one parent and child for this plan, then copy or add another plan and select the next parent. Uncheck the Principals checkboxes of all that are inapplicable.

10. Click the **Caregiver** checkbox.

Marcie Culhane

11. Click the **Initial** radio button.

Note for Discussion:

- Initial Due date field - This field displays The Initial Due Date and is not modifiable. It is calculated as 30 days from the date the first child was removed from the home.

12. Click the calendar icon in the **Date Original Plan Submitted** field.

 **Today's Date**

For Initial Family Plans the **Previous Review Date** field will be blank.

Note for Discussion:

- Use this field to enter the date the original Plan was submitted.

13. Click the calendar icon in the **Current Review Date** field.

 **Today's Date**

Note for Discussion:

- Use this field to enter the current Plan review date.
- If the plan is Initial (**Initial** radio button selected) the Next Review Date is calculated as 6 months from the Date of Removal and is displayed read only; For Reviews (**Review** radio button selected) the date automatically populates to 6 months from Current Review Date entered.

| | |
|--|--|
| <p>14. Click the Permanency Plan dropdown box.</p> | <p style="text-align: right;">Reunification (01)</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> • Compelling Reasons to be documented when specific Permanency Plans cannot be selected. • If concurrent plans are appropriate, select and document compelling reasons. |
| <p>15. Click the Review Type dropdown box.</p> | <p style="text-align: right;">Judicial Review</p> |
| <p>16. Complete the Reasons children cannot be adequately and safely protected at home field.</p> | <p style="text-align: right;">Ms. Culhane’s abuse of alcohol.</p> |
| <p>17. Complete the Harms which may occur if child(ren) remains in home field.</p> | <p style="text-align: right;">Neglect</p> |
| <p>18. Click the calendar icon in the Projected Date of Achieving Permanency field.</p> | <p style="text-align: right;"> 1 Year from Today’s Date</p> |
| <p>19. Complete the Foster Care Case Plan Participant Information fields as appropriate for the scenario.</p> | <p>Note for Discussion:</p> <ul style="list-style-type: none"> • Must select Yes or No for Hearing Request |
| <p>20. Click the Save button.</p> | <p style="text-align: right;"></p> <p>The case plan information is saved and more expandable sections are created.</p> |
| <p>21. Expand the Reunification section.</p> | |
| <p>22. Click the dropdown box.</p> | <p style="text-align: right;">Neglect</p> |
| <p>23. Click the Add button.</p> | <p style="text-align: right;"></p> <p>The Foster Care Goal/Step Detail page displays.</p> |
| <p>24. Update the Change/Goal field.</p> | <p>Ms. Culhane will demonstrate the ability to care for and supervise both Ashley and Heather.</p> <p>Notes for discussion:</p> <ul style="list-style-type: none"> • The goals and steps are already populated with standardized text, but users should comply with documentation standards. |

| | | |
|-----|--|---|
| 25. | In the first section, click the Selected checkbox. | |
| 26. | Complete the Responsibility field. | DFCS |
| 27. | Click the Status dropdown box. | New |
| 28. | Click the calendar icon in the Anticipated Completion field. |  6 Months from Today's Date |
| 29. | Click the Save button. |  |
| | <p>The Foster Care Case Plan Family Detail page displays.</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> When adding steps, suggestion is to add several blank steps prior to entering data due to formatting issues, the added steps will appear above the existing ones. Unused step fields can be deleted. | |
| 30. | In the Secondary Goals section, click the Add button. |  |
| | The Secondary Goals page displays. | |
| 31. | Complete the Description field. | Ms. Culhane will enroll in a two year technical program for computer programming at East Point Community Center. |
| 32. | Click the Status dropdown box. | New |
| 33. | Click the Save button. |  |
| | The Foster Care Case Plan Family Detail page displays. | |
| 34. | Expand the Foster Care Case Plan Participant List section. | |
| 35. | Click the Add button. |  |
| | The Foster Care Participant Detail page displays. | |
| 36. | Click the Participant Type dropdown box. | Other |
| 37. | Complete the Name field. | Norma Hobbs |

| | |
|--|---|
| <p>38. Complete the Relationship/Interest field.</p> | <p style="text-align: right;">Counselor</p> <p>Note for Discussion:</p> <ul style="list-style-type: none"> Signed Receipt Copy Field is only for parents/caregivers from whom custody was removed. |
| <p>39. Click the calendar icon in the Participation Date field.</p> | <p style="text-align: right;"> Today's Date</p> |
| <p>40. Click the Save button.</p> | <p style="text-align: right;"></p> <p>The Foster Care Case Plan Family Detail page displays.</p> <p>Note for Discussion:</p> <ul style="list-style-type: none"> Add all participants who attended the case planning. <p style="text-align: right;">For training purposes: Add a Person in Case and Staff</p> |
| <p>41. Click the Forms dropdown box.</p> | <p style="text-align: right;">Culhane, Ashley</p> |
| <p>42. Click the Launch button.</p> | <p>The case plan form displays in a new window.</p> <p>Note for Discussion:</p> <ul style="list-style-type: none"> At present time, only one view available. All pages printed are around 27 as it pulls pages from WTLF, etc which may not apply to every case. |
| <p>43. Enter comments as needed.</p> | |
| <p>44. Click the Disk icon.</p> | <p>The form is saved.</p> <p>Note for Discussion:</p> <ul style="list-style-type: none"> This action must be completed prior to Save and Submit for approval or data will be lost and an error will occur. Must save all changes prior to Save and Submit even if an error occurred and the system required user to make corrections. Save form again. |

45. Click the **Close** button.

The Foster Care Case Plan Family Detail page displays.

Note for Discussion:

- Launch the plan for each child and make comments as needed.

46. Click the **Save and Submit** button.

A confirmation message displays in a new window.

47. Click the **OK** button.



The To-Do Detail page displays.

Notes for discussion:

- User's need to ensure that approval is directed to the appropriate approving manager. If manager needs to be changed, select Select Staff button and choose correct manager for approval to be routed to.
- User's can enter comments at this point if applicable.

48. Click the **Save** button.

The To-Do Detail page refreshes and displays a confirmation message.

Note for discussion:

- Always ensure that you receive the confirmation message to complete the routing of the submission for approval.

Attention:

- **Your data has been successfully saved to the database**

Notes for Discussion:

- You can save the information and return to complete the family plan later. SHINES does not lock you out of the family plan and allows you to return immediately to complete it.
- Do not Update the Family Plan unless changes have been approved by the Court.
- The most currently approved Family Plan will be available for the Court to view through the CPRS system. The Court is not able to make changes to the plan. If changes are required per the court, workers would need to "update" the plan and Save/Submit to their Supervisor for approval so that the most current plan is sent to CPRS.
- If there is more than one child in care, FCF Family Plan relates to all children in care; therefore, the copy to all children feature is obsolete.

Step 20: Approve Child Plan/Family Plan (Supervisory function)

Notes for Discussion:

- Continue following policy regarding review of all case information prior to approval. You can update the case as needed before approving.

Getting Started: Begin these steps from the [To-Do Detail](#) page.

| Action | Notes |
|--|--|
| 1. Click the My Tasks first level tab. | The Assigned Workload page displays. |
| 2. Click the Staff To-Do List second level tab. | The Staff To-Do List page displays. |
| 3. Click the Task hyperlink next to the GS - Approve Foster Care Case Plan task. | The Foster Care Case Plan Family Detail page displays. Notes for discussion: <ul style="list-style-type: none">• Review all the sections, expandable sections and narrative prior to approval. |
| 4. Click the Approval Status button. | The Approval Status - Approve Foster Care Case Plan Family page displays. |
| 5. Complete the Password field. | Use the password provided by your instructor. Notes for discussion: <ul style="list-style-type: none">• In this field, use the password you use to log in to SHINES. |
| 6. Click the Approve button. | A confirmation message displays in a new window. Notes for discussion: <ul style="list-style-type: none">• To reject the intake, complete the Comments and Password fields and click the Reject button. |

7. Click the **Cancel** button.

The Approval Status page displays.

Notes for discussion:

- As the approver, you can require an additional approval.
- If you click the **OK** button, an additional approval is required.
- A new to-do is created. Use the **Select Staff** function to assign the to-do to the additional approver.

8. Click the **Save** button.

A rectangular button with a dark grey background and the word "Save" in white text.

The Staff To-Do List page displays.

Summary

--- Questions & Answers

8/29/2007

25

Notes

That concludes the Initial Foster Care demonstration. Let's review some of the highlights.

- Once the case manager enters the custody of a child in SHINES, the Foster Care Stage automatically opens and the foster case unit can begin adding information to the case.
- Requests for services will be initiated, reviewed, and approved in SHINES.
- Case plans will be created in SHINES. Information entered in SHINES will be shared with CPRS via an interface. Courts will have access to review case plans via CPRS (Case Plan Reporting System). However, comments made in CPRS will not be accessible in SHINES.
- SHINES has a list of all county and state resources available for case managers (statewide) to view and select for children and families.
- Case managers **must** update children's placements as soon as a new placement occurs. All invoices are generated based on current and accurate placement information in SHINES.
- Most initial foster care tasks such as custody, legal actions, placement information, family team meetings, family plans, contacts, etc. are documented in SHINES.

Module

4

Foster Care Case Management

| | |
|---|--|
| <p style="text-align: center;">Module 4: Foster Care Case Management</p> <p><small>6/12/2008 10</small></p> | <p><u>Notes</u></p> <p>Module 4</p> <p>In the last module, you learned how to complete the initial foster care process in SHINES. In this module, we will continue with Foster Care Case Management.</p> |
| <p><i>Foster Care Case Management</i></p> <p>Learning Objectives</p> <p>After completing this module, you will be able to:</p> <ul style="list-style-type: none"> ▪ List the steps required to complete Foster Care Case Management tasks in SHINES ▪ Identify the SHINES pages, fields, and information used to complete each step of the Foster Care Case Management process. ▪ Using Toolkit tools and sample case studies, demonstrate how to complete Foster Care Case Management tasks <p><small>6/12/2008 11</small></p> | <p><u>Notes</u></p> <p>Review the Learning Objectives</p> <p>After completing this module, you will be able to:</p> <ul style="list-style-type: none"> ➤ List the steps required to complete Foster Care Case Management in SHINES. ➤ Identify the SHINES pages, fields, and information used to complete each step of the Foster Care Case Management process. ➤ Using Toolkit tools and sample case studies, demonstrate how to complete Foster Care Case Management tasks. |
| <p><i>Foster Care Case Management</i></p> <p>Steps & Process</p> <ol style="list-style-type: none"> 1. Record Contact 2. Add and Update Person Details 3. Record Diligent Search 4. Review Family Plans 5. Record Legal Actions 6. Enter External Documentation 7. Discuss Case Closure <p><small>6/12/2008 12</small></p> | <p><u>Notes</u></p> <p>These are the high-level steps for managing a foster care case through SHINES.</p> <p>Briefly review these steps.</p> |

Step 1: Record Contacts

Notes for Discussion:

- This process replaces the Online IDS Form 452.

Getting Started: Begin these steps from the [Staff To Do List](#) page. Click on the [Workload](#) second level tab.

| Action | Notes |
|---|---|
| 1. Click the Stage Name hyperlink. | #04Culhane, Ashley – FCC The Case Summary page displays. |
| 2. Click the Contacts/Summaries second level tab. | The Contact Search List page displays. |
| 3. Click the Add button. |  The Contact Detail page displays. |
| 4. Click the Type dropdown box. | Parent/Child Visitation |
| 5. Click the Continue button. |  The Contact Detail page refreshes and displays additional fields. |
| 6. Click the calendar icon in the Contact Date field. |  Today's Date |
| 7. Complete the Time field. | 9:00am Notes for discussion: <ul style="list-style-type: none"> Use the Attempted checkbox to indicate the contact was attempted, not completed. |
| 8. Click the Purpose dropdown box. | Parent Child Visit |
| 9. Click the Method dropdown box. | Announced Face to Face |
| 10. Click the Location dropdown box. | Foster Home Note for discussion: <ul style="list-style-type: none"> This field is for tracking purposes to determine that contact standards are met. |
| 11. Click the Others Contacted dropdown box. | Foster Parent |

| | | |
|-----|--|---|
| 12. | Enter Name of Agency field | Joyce Smith |
| 13. | Permission to cross county lines checkbox is used as applicable. | |
| 14. | Click on Principals/Collaterals Contacted checkboxes that apply to this scenario. | Culhane, Ashley Culhane, Heather Culhane, Marcie |
| 15. | Click the Save button. |  Save |
| | | The contact information is saved. Discuss these highlights: <ul style="list-style-type: none"> • When you save, the contact becomes read-only except for the narrative. • You must save before entering the narrative. |
| 16. | Click the Narrative button. |  Narrative |
| | | The Narrative page displays in a new window. |
| 17. | Complete the Narrative field. | CM observed Ms Culhane interact with both Heather and Ashley. Ms Culhane hugged Ashley while they sat together and talked. Ms. Culhane fed Heather a bottle. |
| 18. | Click the Disk icon. | The narrative information is saved. |
| 19. | Click the Close button. | The Contact Detail page displays. |
| 20. | Click the Contact Search List third level tab | The Contact Search List page displays. |
| 21. | Click the Add button. |  Add |
| | | The Contact Detail page displays. |
| 22. | Click the Type dropdown box. | Contact |
| 23. | Click the Continue button. |  Continue |
| | | The Contact Detail page refreshes and displays additional fields. |
| 24. | Click the calendar icon in the Contact Date field. |  Today's Date |

| | |
|---|---|
| <p>25. Complete the Time field.</p> | <p style="text-align: right;">9:30am</p> <p>Notes for discussion:</p> <ul style="list-style-type: none"> • Use the Attempted checkbox to indicate the contact was attempted, not completed. |
| <p>26. Click the Purpose dropdown box.</p> | <p style="text-align: right;">Collateral</p> |
| <p>27. Click the Method dropdown box.</p> | <p style="text-align: right;">Telephone Call</p> |
| <p>28. Click the Location dropdown box.</p> | <p style="text-align: right;">Hospital</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> • This field is for tracking purposes to determine that contact standards are met. |
| <p>29. Click on Others Contacted dropdown.</p> | <p style="text-align: right;">Medical</p> <p>Note for Discussion:</p> <ul style="list-style-type: none"> • Use the Others Contacted and Name of Agency boxes to capture persons/agencies that do not have a profile created in the case. |
| <p>30. Name of Agency</p> | <p style="text-align: right;">Joann Watts</p> |
| <p>31. Click the Save button.</p> | <div style="text-align: right; margin-bottom: 10px;">  </div> <p>The contact information is saved.</p> <p>Discuss these highlights:</p> <ul style="list-style-type: none"> • When you save, the contact becomes read-only except for the Narrative. You can modify/update the Narrative section as long as the stage is in the open status. • You must save before entering the Narrative. |
| <p>32. Click the Narrative button.</p> | <div style="text-align: right; margin-bottom: 10px;">  </div> <p>The Narrative page displays in a new window.</p> |
| <p>33. Complete the Narrative field.</p> | <p style="text-align: right;">CM contacted Ms Watts to discuss Heather and Ashley’s next appointment with the pediatrician.</p> |
| <p>34. Click the Disk icon.</p> | <p>The narrative information is saved.</p> |
| <p>35. Click the Close button.</p> | <p>The Contact Detail page displays.</p> |

| | |
|---|--|
| 36. Click the Contact Search List third level tab | The Contact Search List page displays. |
| 37. Click the Add button. | <div style="text-align: right;"></div> <p>The Contact Detail page displays.</p> |
| 38. Click the Type dropdown box. | TCM |
| 39. Click the Continue button. | <div style="text-align: right;"></div> <p>The Contact Detail page refreshes and displays additional fields.</p> |
| 40. Click the calendar icon in the Contact Date field. | <div style="text-align: right;"> Today's Date</div> |
| 41. Complete the Time field. | <div style="text-align: right;">1:00pm</div> <p>Notes for discussion:</p> <ul style="list-style-type: none"> • Use the Attempted checkbox to indicate the contact was attempted, not completed. |
| 42. Click the Purpose dropdown box. | Medical |
| 43. Click the Method dropdown box. | Telephone Call |
| 44. Click the Location dropdown box. | <div style="text-align: right;">Facility</div> <p>Note for discussion:</p> <ul style="list-style-type: none"> • This field is for tracking purposes to determine that contact standards are met. |
| 45. TCM Information Section Guarantor/Primary Child: <input type="text" value="Culhane, Ashley"/> <p>This field is grayed out as the Foster Child is always the TCM guarantor/primary child.</p> | <p>Note for discussion:</p> <ul style="list-style-type: none"> • The Eligible and Eligible Program section is grayed out as these fields are for CPS Ongoing stages only. |
| 46. Click the Medical Services (TCM Billable) dropdown box. | <div style="text-align: right;">Yes</div> <p>Note for discussion:</p> <ul style="list-style-type: none"> • This field captures the data to determine if the contact is appropriate for billing. |
| 47. Click on Services Provided (Select all that apply) checkboxes | Client's Substance Abuse Needs |

| | | |
|-----|--|--|
| 48. | Click on Others Contacted dropdown box. | Medical |
| 49. | Name of Agency | Joann Watts |
| 50. | Click the Save button. |  |
| | | <p>The contact information is saved.</p> <p>Discuss these highlights:</p> <ul style="list-style-type: none"> • When you save, the contact becomes read-only except for the narrative. • You must save before entering the narrative. |
| 51. | Click the Narrative button. |  |
| | | The Narrative page displays in a new window. |
| 52. | Complete the Narrative field. | CM discussed Ms. Culhane’s progress with the alcohol assessment. |
| 53. | Click the Disk icon. | The narrative information is saved. |
| 54. | Click the Close button. | The Contact Detail page displays. |
| 55. | Click the Contact Search List third level tab | The Contact Search List page displays. |
| 56. | Click on Forms dropdown box from Forms Launch section | Contact Visitation Log |
| 57. | Click the Launch button | <p>The narrative listing will display of all Parent Child Visitation contact types.</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> • This listing can be printed. |
| 58. | Click the Close button | The Contact Search List page displays |
| 59. | Click on Forms dropdown box from Forms Launch section | Log of Contact Narratives |
| 60. | Click the Launch button | <p>The narrative listing will display of all Contact/Summaries types.</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> • This listing can be printed. |
| 61. | Click the Close button | The Contact Search List page displays |

Notes for Discussion:

- Although there are places to document contacts in all stages, it is good practice to document contacts in each child's FCC stage.
- A **copy** feature is available. To copy from one child's FCC stage to another complete the following steps:

Document your contact in Ashley's FCC stage. If this contact applies to both Ashley and Heather, make sure that both children's names are checked in the section at the bottom for Principals and Collaterals contacted. Once you finish the contact in Ashley's stage, exit to the Case Summary page and switch over to Heather's FCC. Go into the contacts tab and expand the Contact Search section. Search for the contact that you want to copy over by using the dates and names of the Principals/Collaterals contacted section. Make sure you click the checkbox for "**All contacts in the case**" prior to hitting the search button. Once you search, all contacts that match those criteria will display in the results at the bottom. Click the radio button next to the contact that you want to copy, hit the copy button and then you can adjust the date/time and save the contact into Heather's stage.
- When you save a contact with the **Contact/Summary Type** of **TCM** with **Yes** selected in the **Medical Services (TCM Billable)** dropdown box, a billable TCM contact is created.
- You cannot create two billable TCM contacts for the same **Guarantor/Primary Child** in one month no matter if it involves two separate stages (ie ONG and FCC).
- Tear sheets are no longer used.
- Continue following policy and county protocol regarding timeframes for entering contacts.
- Protective Service Alert third level tab is available to enter information if a child or family's whereabouts become unknown to the agency.
- Contact Search feature is available under Contact Search List page to allow users to locate documentation from all stages of a case. Search criteria can be made specific.

Step 2: Add and Update Person Details

Notes for Discussion:

- Avoid duplicate records by searching for an existing person record in SHINES.
- Completing a person search in SHINES is like searching the Master Index in IDS.
- Records Checks document the results of the required screenings.
- Case managers should continue following State policy regarding searching for history.

Getting Started: Begin these steps from the [Contact Detail](#) page.

| Action | Notes |
|---|--|
| 1. Click the Person second level tab. | The Person List page displays. |
| 2. Click the Add button. | <div style="text-align: right; border: 1px solid black; padding: 2px; display: inline-block;">Add</div> <p>The Person Search page displays.</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> • If person search is not perform accurately, there will be possible results of a duplicate person in the system. |
| 3. Complete the Last field. | Smiley |
| 4. Complete the First field. | Melody |
| 5. Click the Gender dropdown box. | Female |
| 6. Click the Search button. | <p>The Person Search page refreshes and displays the search results.</p> <p>Notes for discussion:</p> <ul style="list-style-type: none"> • If the person is not found, click the Add button to begin adding a new person record. • If the person is found, click the radio button to select the appropriate person and then click the Relate button. Relating information will pull over prior demographics on the person detail page which may require updating. Also the previously assigned Person ID will be used. |
| 7. Click the Add button. | The Person Detail page displays. |
| 8. Click the Gender dropdown box. | Female |

| | | |
|-----|--|--|
| 9. | Click the Marital dropdown box. | Married |
| 10. | Click the Age field and Approximate checkbox | 37 |
| 11. | Click the Type dropdown box. | Collateral |
| 12. | Click the Relationship dropdown box. | First Cousin |
| 13. | Click the Resource Household Member checkbox | Note for discussion: <ul style="list-style-type: none"> This will populate this person's information on the Relative Care Assessment. |
| 14. | Click the Side of Family dropdown box. | Maternal Note for discussion: <ul style="list-style-type: none"> Special Relationship comment box can be a useful area to document more specific relationships. |
| 15. | Expand the Race/Ethnicity section. | |
| 16. | Click the Race checkbox. | White |
| 17. | Click the Ethnicity radio button. | Not Hispanic/Latino |
| 18. | Click the Save button. | The Person Detail page refreshes and displays additional sections. |
| 19. | Expand the Address section. | |
| 20. | Click the Add button. | The Address Detail page displays. |
| 21. | Click the Type dropdown box. | Residence |
| 22. | Click the Primary checkbox. | |
| 23. | Complete the Street field. | 106 Valley Brook Circle |
| 24. | Complete the City field. | Dawsonville |
| 25. | Click the State dropdown box. | Georgia |
| 26. | Click the Validate button | The Address Validation page displays in a new window. |
| 27. | Click the Yes button. | The Address Detail page displays. |
| 28. | Expand the Phone section. | |
| 29. | Click the Add button. | The Phone Detail page displays. |
| 30. | Click the Type dropdown box. | Residence |
| 31. | Click the Primary checkbox. | |

32. Complete the **Number** field.

706-555-1212

33. Click the **Save** button.

The Person Detail page displays.

Note for Discussion:

- All Records Checks must be completed for all individuals per policy.
- Persons may change from Collaterals to Principals. For example, the agency might be working a case to re-unite the child with a relative that was identified during the diligent search process versus the parent the child was removed from, etc...
- All Principals must have an exact date of birth, a CRS ID and Person Characteristics.
- Create Person profiles for anyone that you are going to be contacting throughout the life of the case on a regular basis. (except for law enforcement, the health department, etc..)

Step 3: Record Diligent Search

Notes for Discussion:

- The Diligent Search Detail page replaces the face sheet section of CPRS.
- The Diligent Search Report Form replaces the diligent search report in CPRS.
- Diligent searches can be completed as early as the INV stage.

Scenario: Adding Mary Smith to Ashley’s diligent search report.

Getting Started: Begin these steps from the **Person Detail** page for Melody Smiley.

| Action | Notes |
|--|--|
| 1. Click the Person second level tab | The Person List page displays. |
| 2. Click the Name hyperlink | Culhane, Ashley Note for discussion: <ul style="list-style-type: none"> • All Diligent Search information must be entered under the child’s person detail page. |
| 3. Click the Diligent Search third level tab. | Diligent Search The Diligent Search List page displays. |
| 4. Click the Add button. |  The Person List page displays. |
| 5. Click the Name radio button. |  Smith, Mary |
| 6. Click the Continue button. |  The Diligent Search Information page displays. |
| 7. Click the Include in Diligent Search Report checkbox. | Note for Discussion: <ul style="list-style-type: none"> • By selecting this checkbox, the data will be included in the printable Diligent Search report. |
| 8. Click the Referral Type dropdown box. | Family Interview |
| 9. Complete the Referrer’s Name field. | Marcie Culhane |
| 10. Click the Was the person successfully contacted radio button. | Yes |

| | | |
|---|---|---|
| 11. | Click the Current Outcome of Contact dropdown box. | Not Interested |
| 12. | Click the Is person willing to be a visitation resource radio button. | <input type="radio"/> Yes |
| 13. | Click the Is person a potential placement resource radio button. | <input type="radio"/> No |
| 14. | Complete the If not, why Comments field. | Not interested at this time due to the health issues of her husband. |
| 15. | Click the calendar icon in the Date Relative Care Subsidies Discussed field. | <p>Today's Date</p> <p>Notes for discussion:</p> <ul style="list-style-type: none"> The Date Relative Care Subsidies Discussed field is required if you select Yes in the Was the person successfully contacted field. SHINES enforces this requirement, even if the person is not a potential placement resource. You may enter clarifying comments in the Comments field. |
| 16. | Click the Save button. | The Diligent Search List page displays. |
| 17. | Click the Forms dropdown box. | Diligent Search Report Form |
| 18. | Click the Launch button. | <p>The Diligent Search Report Form displays in a new window.</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> Diligent Search Report Form can be printed. |
| 19. | Click the Close button. | The Diligent Search List page displays. |
| <p>Notes for Discussion:</p> <ul style="list-style-type: none"> Entering Diligent Search information always starts from the child's Person Detail page. You must add a person to the Person List page before entering Diligent Search information for that person. | | |

Step 4: Reviewing Child Plan

Getting Started: Begin these steps from the [Diligent Search List](#) page.

| Action | Notes |
|---|--|
| 1. Click the Child Plans second level tab. |  <p>The Foster Care Case Plan Child List page displays.</p> |
| 2. Click the checkbox of the Comp Child Plan and select Copy button. | <p>The Foster Care Case Plan Child Detail page displays.</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> • Only COMP status plans can be copied. |
| 3. Select the Save button | <p>Note for discussion:</p> <ul style="list-style-type: none"> • Review all field for any updates needed. |
| 4. Expand the DFCS Standard Goals section. | |
| 5. Click the DFCS Standard hyperlink. | The Foster Care Goal/Step Detail page displays. |
| 6. Review Goal and Steps | |
| 7. Select the Status dropdown box for each step. | Ongoing |
| 8. Select the Anticipated Completion calendar icon. | 6 months from today's date |
| 9. Select Save button | The Foster Care Case Plan Child Detail page displays. |

11. Click the **Complete?** button.

The Foster Care Case Plan Child List page displays.

Note for Discussion:

- By selecting the Complete ? button, the child plan is coded as COMP. Otherwise, the system will show code as PROC and cannot be submitted for approval.

Note for Discussion:

- Make necessary updates to the existing goals/steps as applicable.
- Copy or Add Child Plan and make updates to plan as appropriate prior to submitting Family Plan for approval.
- Child Plan must be updated for every Review period.

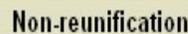
Step 5: Reviewing Family Plan

Notes for Discussion:

- In FCC Stage, copy Child Plan and make updates to plan as appropriate **prior to** submitting Family Plan for approval.
- The Update button refers to modifying an already existing court ordered Family as directed by the Courts during the same review period.

Getting Started: Begin these steps from the [Foster Care Case Plan Child List](#) page.

| Action | Notes |
|---|--|
| 1. Click the Case Summary second level tab. | The Case Summary page displays. |
| 2. Click the Stage Name radio button. | #04Culhane, Marcie – FCF The Case Summary page refreshes and displays a confirmation message. |
| 3. Click the Select Stage button | The Case Summary page for the FCF stage displays |
| 4. Click the Family Plans second level tab. | The Foster Care Case Plan Family List page displays. |
| 5. Select the radio button of the approved plan. | |
| 6. Click the Copy button. | Note for Discussion: <ul style="list-style-type: none"> • Update button is used only to make changes to court ordered family plans when the Judge issues a new order directing changes to be made. |
| 7. Click the Permanency Plan Type dropdown box. | Nonreunification |
| 8. Click the Review radio button. | Note for Discussion: <ul style="list-style-type: none"> • Initial Due date field - This field displays The Initial Due Date and is not modifiable. It is calculated as 30 days from the date the first child was removed from the home. |
| 9. Clear the Next Review Date field. | |

| | |
|--|---|
| <p>9. Click the calendar icon in the Current Review Date field.</p> | <p> Today's Date</p> <p>Note for Discussion:</p> <ul style="list-style-type: none"> • Use this field to enter the current Plan review date. • For Reviews (Review radio button selected) the Next Review Date automatically populates to 6 months from Current Review Date entered. |
| <p>10. Click the calendar icon in the Previous Review Date field.</p> | <p> Enter Date of Previous Review</p> <ul style="list-style-type: none"> • This is the last review that was completed. |
| <p>11. Click the Permanency Plan dropdown box.</p> | <p>Adoption (03)</p> |
| <p>12. Click the Save button.</p> | <p></p> <p>The family plan information is saved.</p> |
| <p>13. Click the hyperlink for the Reunification goal.</p> | <p>Neglect</p> |
| <p>14. Select Status dropdown</p> | <p>No Progress</p> |
| <p>15. Click the Save button.</p> | <p></p> <p>The Foster Care Plan Family Detail page is displayed.</p> |
| <p>16. Expand the Non-reunification section.</p> | <p></p> |
| <p>17. Click the dropdown box.</p> | <p>Adoption</p> |
| <p>18. Click the Add button.</p> | <p></p> <p>The Foster Care Goal/Step Detail page displays.</p> <p>Note for Discussion:</p> <ul style="list-style-type: none"> • Make updates to generic goals/steps. |
| <p>19. In the first Step section, click the Selected checkbox.</p> | |
| <p>20. Complete the Priority field.</p> | <p>1</p> |
| <p>21. Complete the Responsibility field.</p> | <p>DFCS</p> |

| | | |
|-----|---|--|
| 22. | Click the Status dropdown box. | New |
| 23. | Click the calendar icon in the Anticipated Completion Date field. |  30 Days from Today's Date |
| 24. | Click the Save button. |  |
| | | The Foster Care Case Plan Family Detail page displays. |
| 25. | Under the Secondary Goals, Foster Care Plan Participant Information and Foster Care Plan Participant List sections, complete updates. | |
| 26. | Click the Forms dropdown box. | Culhane, Ashley |
| 27. | Click the Launch button. | The case plan form displays in a new window. |
| 28. | Enter Comments as needed. | |
| 29. | Click the Disk icon. | The form is saved. Note for Discussion: <ul style="list-style-type: none"> • This action must be completed prior to Save and Submit for approval or an error will occur. |
| 30. | Click the Close button. | The Foster Care Case Plan Family Detail page displays. |
| 31. | Click the Save and Submit button. |  |
| | | A confirmation message appears in a new window. |
| 32. | Click the OK button. | The To-Do Detail page displays. Notes for discussion: <ul style="list-style-type: none"> ▪ If user is not ready to submit information for Supervisory approval, click Save button. ▪ User's need to ensure that approval is directed to the appropriate approving manager. If manager needs to be changed, click Select Staff button and choose correct manager for approval to be routed to. ▪ User's can enter comments at this point if applicable. |

33. Click the **Save** button.

The To-Do Detail page refreshes and displays a confirmation message.

Note for discussion:

- Always ensure that you receive the confirmation message to complete the routing of the submission for approval.

Attention:

- **Your data has been successfully saved to the database**

Note for Discussion:

- **Services and Referral Checklist** third level tab is used to document the types of services and referrals that were provided to the family during various stages.

Step 6: Approve Child Plan/Family Plan (Supervisory Function)

Notes for Discussion:

- Continue following policy regarding review of all case information prior to approval. You can update the case as needed before approving.

Getting Started: Begin these steps from the [To-Do Detail](#) page.

| Action | Notes |
|--|---|
| 1. Click the My Tasks first level tab. | The Assigned Workload page displays. |
| 2. Click the Staff To-Do List second level tab. | The Staff To-Do List page displays. |
| 3. Click the Task hyperlink next to the GS - Approve Foster Care Case Plan task. | <p>The Foster Care Case Plan Family Detail page displays.</p> <p>Note for discussion: Review all the sections, expandable sections and narrative prior to approval.</p> |
| 4. Click the Approval Status button. | The Approval Status - Approve Foster Care Case Plan page displays. |
| 5. Complete the Password field. | <p>Use the password provided by your instructor.</p> <p>Notes for discussion:</p> <ul style="list-style-type: none"> • In this field, use the password you use to log in to SHINES. |
| 6. Click the Approve button. | <p>A confirmation message displays in a new window.</p> <p>Notes for discussion:</p> <ul style="list-style-type: none"> • To reject the intake, complete the Comments and Password fields and click the Reject button. |

7. Click the **Cancel** button.

The Approval Status page displays.

Notes for discussion:

- As the approver, you can require an additional approval.
- If you click the **OK** button, an additional approval is required.
- A new to-do is created. Use the **Select Staff** function to assign the to-do to the additional approver.

8. Click the **Save** button.

A rectangular button with a dark grey background and the word "Save" in white text.

The Staff To-Do List page displays.

Step 7: Record Legal Actions and Outcomes

Notes for Discussion:

- Each legal action (whether documenting a request, hearing or receipt of a court order) must be documented as a separate record in SHINES.
- Court order date field is to be completed for reporting purposes.
- Counties need to ensure all Legal Actions are documented in the FCC stage.
- The Legal Action and Outcome Detail page documents the case tracking and legal sections of the case plan.

Getting Started: Begin these steps from the [Staff To-Do](#) page. Click the [Workload](#) tab, [#04Culhane, Ashley- FCC](#) stage.

| Action | Notes |
|--|---|
| 1. Click the Legal second level tab. | The Legal Actions List page displays. Notes for discussion: <ul style="list-style-type: none"> • Legal Actions – Lists legal actions related to the current stage. • Legal Actions for Case – Lists legal actions related to all stages in the current case. |
| 2. Click the Add button. |  |
| | The Person List page displays. |
| 3. Click the calendar icon in the Court/Action Date field. |  Today's Date |
| 4. Click the Action dropdown box. | Legal Action Request |
| 5. Click the Hearing Type/Court Order dropdown box. | Non-Reunification |
| 6. Click the Save button. |  |
| | The Legal Action and Outcome Detail page refreshes and displays a confirmation message. |
| 7. Click the Narrative button. | The Legal Action and Outcome Narrative page displays in a new window. |
| 8. Complete the Reasons field. | Agency seeking non-reunification plan. |

| | |
|--|---|
| 10. Click the Close button. | The Legal Action and Outcome Detail page displays. |
| 11. Click the Save and Submit button. | <p>The To-Do Detail page displays.</p> <p>Notes for discussion:</p> <ul style="list-style-type: none"> ▪ If user is not ready to submit information for Supervisory approval, click Save button. ▪ User's need to ensure that approval is directed to the appropriate approving manager. If manager needs to be changed, select Select Staff button and choose correct manager for approval to be routed to. ▪ User's can enter comments at this point if applicable. |
| 12. Click the Save button. | <p>The To-Do Detail page refreshes and displays a confirmation message.</p> <p>Note for discussion:</p> <ul style="list-style-type: none"> ▪ Always ensure that you receive the confirmation message to complete the routing of the submission for approval. <p>Attention:</p> <ul style="list-style-type: none"> • Your data has been successfully saved to the database |
| <p>Note for Discussion:</p> <ul style="list-style-type: none"> ▪ The system requires mandatory Supervisory approval for two types of Legal Actions: Legal Action Request and Request Shelter Care. ▪ All other Legal Action types only require users to check the completed checkboxes and save. The status will display as COMP. Once the Complete checkbox is selected and the page is saved, the fields will become read only. ▪ County protocol should be followed regarding which Legal Actions to submit for approval. ▪ Note that there is also a Legal Status tab. This will need to be update for each child if the child is returned home or custody is given to a relative, etc... | |

Step 8: Approve Legal Action (Supervisory Function)

Notes for Discussion:

- Continue following policy regarding review of all case information prior to approval. You can update the case as needed before approving.

Getting Started: Begin these steps from the [To-Do Detail](#) page.

| Action | Notes |
|---|--|
| 1. Click the My Tasks first level tab. | The Assigned Workload page displays. |
| 2. Click the Staff To-Do List second level tab. | The Staff To-Do List page displays. |
| 3. Click the Task hyperlink next to the GS - Approve Legal Action task. | The Foster Care Case Plan Family Detail page displays. Notes for discussion: Review all the sections, expandable sections and narrative prior to approval. |
| 4. Click the Approval Status button. | The Approval Status - Approve Legal Action page displays. |
| 5. Complete the Password field. | Use the password provided by your instructor. Notes for discussion: <ul style="list-style-type: none">• In this field, use the password you use to log in to SHINES. |
| 6. Click the Approve button. | A confirmation message displays in a new window. Notes for discussion: <ul style="list-style-type: none">• To reject the intake, complete the Comments and Password fields and click the Reject button. |

7. Click the **Cancel** button.

The Approval Status page displays.

Notes for discussion:

- As the approver, you can require an additional approval.
- If you click the **OK** button, an additional approval is required.
- A new to-do is created. Use the **Select Staff** function to assign the to-do to the additional approver.

8. Click the **Save** button.

A rectangular button with a dark grey background and the word "Save" in white text.

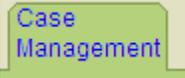
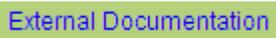
The Staff To-Do List page displays.

Step 9: Enter External Documentation

Notes for Discussion:

- External documentation refers to both electronic files stored in SHINES and paper files stored externally.
- You can only attach electronic files in PDF or JPG formats. To re-format documents in the PDF format, use the CUTEPDF function under your tablet's print function. Photos can be reformatted by selecting a JPG file when the Save As function is selected. There is a helpful document for converting documents into the PDF format contained in your participant guide.
- The Sort field, must be two digits.

Getting Started: Begin these steps from the [Staff to Do List](#) page. Click the [Workload](#) tab, [#04Culhane, Ashley-FCC](#) stage hyperlink.

| Action | Notes |
|--|---|
| 1. Click the Case Management second level tab. |  The Case Maintenance page displays. |
| 2. Click the External Documentation third level tab. |  The External Documentation List page displays. |
| 3. Click the Add button. |  The External Documentation Detail page displays. |
| 4. Click the Type dropdown box. | Legal Documents |
| 5. Click the Item Location dropdown box. | Case File |
| 6. Enter in Comment field | Non-Reunification Order |
| 7. Click the Save button. |  The External Documentation List page displays. |

Note for discussion:

- Item Location dropdown includes Foster Home to document the location of a child's life book.
- All items located in the paper file should be referenced in the external documentation.

Case Closures:

- **When custody is returned to birth parent,** FCC stage is closed while FCF stage remains open until Aftercare is completed. If no Aftercare is court ordered, then close FCC stage prior to FCF stage.
- **When custody is transferred to relative and Relative Care Subsidy is involved,** stage progress FCC stage to PFC. Then close FCC and FCF stages.
- **When case moves into Adoption status,** FCC stage remains open until the 33's/37's are signed in order to continue with IV-E Redeterminations and Non-Adoptive Home placements.

To close a FCC stage:

Click on the Case Management second level tab
Click on Close Foster Care Child Stage

Select appropriate reason, add comments and save and submit for Supervisory approval.

Reminder: All pending approvals must be complete prior to submitting closure.

*Don't forget to update the Legal Status as well as close out Placement, Payment of Care and Service Authorization sections.

To close a FCF stage:

Click on the Case Management second level tab
Click on Close Foster Care Family Stage

Select appropriate reason, add comments and save and submit for Supervisory approval.

Reminder: All pending approvals must be complete prior to submitting closure.

Demonstration Highlights

- Diligent Search information will be documented in SHINES.
- Legal actions and outcomes will be documented in SHINES.
- Case managers will document all contacts, including billable and non- billable TCM's with children, parents, caretakers, and service providers or other significant persons related to a case in SHINES. Case managers will no longer complete Tear Sheets.
- Case Plans will be updated in SHINES and made available to the court via the CPRS interface.

6/12/2008

14

Notes

That concludes the Foster Care Case Management demonstration. Let's review some of the highlights.

- Diligent Search information will be documented in SHINES.
- Legal actions and outcomes will be documented in SHINES.
- Case managers will document all contacts, including billable and non- billable TCM's with children, parents, caretakers, and service providers or other significant persons related to a case in SHINES. Case managers will no longer complete Tear Sheets.
- Case Plans will be updated in SHINES and made available to the court via the CPRS interface.

Summary

--- Questions & Answers

8/29/2007

34