

01-12-16 CASE REVIEW TECHNICAL ASSISTANCE WEBINAR NOTES

Welcome and Housekeeping

- Webinar agenda, PowerPoint, and notes will be available on the [Case Review Webpage](#)
- Purpose and Structure of Technical Assistance Webinars
 - To discuss changes to procedures and process, to review and update instruction provided, and to offer training and educational opportunities
 - These webinars neither replace the three coaching calls you are required to participate in to become a certified Case Reviewer, nor do they take the place of the ongoing coaching calls that a number of Regional Training Academies provide to support Reviewers, rather you are encouraged to participate in all supports to the extent possible
 - CDSS welcomes suggestions for future agenda items, please email suggestions to the [Case Review Inbox](#)
- Follow-up from Webinar on 12-08-15
 - Two counties, Sonoma and San Francisco, are currently providing incentives for key participant interviews
 - Both in different stages i.e., Sonoma started using incentives this month and San Francisco just received approval to initiate the use of incentives
 - We may ask them to present/discuss on an upcoming webinar
 - The allocation made to counties for case reviews cannot be used to provide incentives
 - Reminder: do NOT finalize cases in OMS
 - Clicking “Finalize Case” updates the case status to Approved and Final, and neither a Reviewer nor a State, or Federal Site Leader has the ability to make any further edits to the case or to QA Notes e.g., Second Level QA cannot be done
 - If a case is inadvertently finalized, we have to put a request into JBS (the contractor who developed OMS) to “re-open” the case, which also requires additional requests and permissions delaying the process

Polling Outcomes

- What is the status of case review hiring?
 - Of the participants that responded, 31% said their county has hired all case review staff that are planned for; 28% said their county is still hiring/recruiting Reviewers; 18% said their county is still hiring/recruiting Reviewers and QA staff; 14% said their county is not in the process of hiring, but plans to start; 8% said their county is still hiring/recruiting QA staff; and 2% said their county has hired all Reviewers that are planned for, but they are still hiring/recruiting QA staff

- Is your county using review staff for broader CQI activities?
 - Of the participants that responded, 44% said yes, both Reviewers and QA staff are responsible for CQI; 31% said no, but they are planning to incorporate these functions; 10% said yes, but only the case reviewer is responsible for CQI; 8% said no, and they expect to keep case reviews and CQI separate; and 7% said yes, but only the QA staff is responsible for CQI
- What feedback are Reviewers providing based on findings?
 - Of the participants that responded, 37% said they provide aggregate information to management and develop policy/practice notes or bulletins for staff; 23% said they provide aggregate information to management; 17% said they provide aggregate information to management and the individual case worker; 17% said they provide aggregate information to management and the individual case worker, and develop policy/practice notes or bulletins for staff; 5% said they develop policy/practice notes or bulletins for staff; and 2% said they provide feedback to the individual caseworker

CDSS Site Visits/Second Level QA

- Over the next few weeks, CDSS will be making site visits to a number of counties to perform Second Level QA, and to observe county practice including key participant interviews

Item/Definition Clarifications

- The Period Under Review (PUR) is generally from the designated PUR start date until the day you begin the ratings in OMS or case closure
- End of PUR considerations
 - Review ends when you begin to rate the items, the review is not ongoing throughout the QA process e.g., A Reviewer begins rating a foster care case yesterday and expects to do Initial QA within the next couple days, but a new referral comes in today – this referral is not utilized for the purpose of case reviews
 - Review ends when the case is closed, but all cases open during the PUR are part of the rating
 - Return home from Foster Care e.g., A minor in a foster care case is returned home in an open Family Maintenance case
 - Multiple cases/episodes e.g., One case closes and then another is opened during the PUR
- The Administration for Children and Families (ACF) provided a [Reviewer Brief](#) for Item 12 in the Onsite Review Instrument (OSRI), which is available on our [webpage](#)
 - This brief is intended to strengthen how reviewers determine, during case reviews, whether or not the agency (1) made concerted efforts to assess the needs of children, parents, and foster parents to identify the services necessary to achieve case goals and adequately address the issues relevant to the agency's involvement with the family, and (2) provided the appropriate services

- Includes expanded considerations for the item, example questions that may be addressed, and case specific examples

Online Monitoring System (OMS) and Procedural Updates

- 01-29-16 finalized cases in OMS will be de-identified
 - De-identification still allows for aggregate data to be pulled in the OMS reports, but if counties wish to have case information that can be linked back to other data sources, then it will need to be exported into Excel/PDF before 01-29-16
- Do not select anyone for Secondary Oversight, that is designated for Federal Site Leaders

Case Review Training Updates

- First QA Training on 01-29-16 in Davis
- Several upcoming Case Review Trainings, training flyers available on our [webpage](#)

Responses to County Questions

- CDSS recommends conducting unannounced home visits to secure key participant interviews
- Counties can have multiple QA staff, but they must not have any oversight responsibility, supervision, or case decision making
- Reviewers who are temporarily certified can attend QA training
- Case review funds do not roll over to the next fiscal year

Next Webinar: Tuesday, February 9, 2016 2pm-3:30pm