

12-08-15 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](#)

Polling Outcomes

- Are you using incentives for key participants?
 - Of the participants that responded, 52% didn't even know that was an option; 22% said no, but considering; 22% said no, not considering; and 4% said yes
 - Counties can only use CDSS funding for staff resources, not incentives
- Are you using a peer quality assurance process in advance of the official quality assurance?
 - Of the participants that responded, 40% said yes; 32% said no and no plans; 20% didn't even know that was an option; and 8% plan to implement
 - CDSS encourages counties to try this as it has worked well for several counties
- Have you made agreements with other counties for case review?
 - Of the participants that responded, 42% said no, but have considered; 22% said no, but exploring options; 22% didn't even know that was an option; 9% said yes, but only for conflict of interest cases; and 5% said yes, for reviews and/or quality assurance functions
 - CDSS encourages counties who are struggling to staff to collaborate with other counties
 - CDSS can assist with securing another county or helping connect with other counties, if needed
 - Agreements can be made with multiple counties

Case Review Inbox

- Making adjustments to [Case Review Inquiry Form](#), which is posted on our [webpage](#), as we learn from counties' requests e.g., we now have a section for case retention requests
- Some counties have difficulty submitting the inquiry form (Acrobat Adobe DC Fillable PDF version) due to technical issues

- CDSS will be looking into this, but in the meantime if you are experiencing this issue then submit the inquiry form to the [Case Review Inbox](#) as an attachment with the subject line “Submitting Completed Form”
- Counties need to provide necessary information on the inquiry form to make a determination e.g., If you want to exclude a child’s interview but retain the case, then provide the age and/or developmental capacity that speaks to why the child is unable to be interviewed
- Some inquiries are not required as long as sufficient information is provided in OMS e.g., if biological parents whereabouts were unknown during the period under review, they do not need to be interviewed
 - Be sure to consider definition for “parents” in instrument (those from whom the child was removed)
- Different standards depending on case type (in-home vs. foster care) in that CDSS is more likely to exclude if in-home review has no family perspective

Online Monitoring System (OMS) Instructions

- [OMS User Manual](#) is available on our [webpage](#)
- CDSS initially instructed counties not to enter information into OMS until the review is complete, but now we are instructing Reviewers to enter information into OMS earlier in the review process i.e., enter information onto the Face Sheet early in the review when working on the case file
 - Information must be entered into OMS even if the case may be eliminated later, CDSS recommends completing the Face Sheet including the participant tables
 - If another county is reviewing your case, the county assigned to complete the review should complete the Face Sheet in OMS
- State staff=Second Level QA
- The State approves case eliminations, but county level QA staff have access to this functionality, however, they should not use it
- Information in OMS can be edited including the child’s name, date the review was completed, and case reviewer and quality assurance staff (as long as the case has not been finalized) by going to Case Overview on the left hand side of the screen and then click on case setup
- When a Reviewer has finished answering all questions and confirms that all item and outcome ratings have generated (on the Case Overview page), a Submit for QA link appears in the upper right corner of the Case Overview page
 - Reviewer can submit for QA, however, QA staff should not finalize a case until State staff does Second Level QA
 - 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
 - CDSS is developing a process for counties to notify the State when a case is ready for Second Level QA – more information will be provided

- After submission to QA staff for review, Reviewers can only view the read-only version of the case
 - In order to go back and edit fields after submitting for QA, the QA staff must return the case to the Reviewer
- Our Federal partners at the Administration for Children and Families (ACF) are looking at OMS for review process
- Do not select anyone for Secondary Oversight, that is designated for Federal Site Leaders

Case Review Training Updates

- 01/25/16-01/28/16 Bay Area Academy Case Review Training
 - To accommodate the new hires since additional resource allocation, additional trainings will be held in February and March
- Planning for QA Training is underway and is expected to roll out by January in Davis
- Refresher Trainings will be offered once per year for each region in an e-learning or webinar format
- Our [webpage](#) is the primary source for case review training updates, such as item clarifications, upcoming trainings, and resource materials

CDSS Quality Assurance (QA) Process

- State performs Second Level QA
- CDSS will contact counties regarding QA for completed cases in OMS over the next few weeks
 - Must enter cases into OMS, Initial QA does not have to be done
- QA sessions often take around one to 1.5 hours depending on the quality of the review and complexity of the case, but it can take longer if questions arise and technical assistance is needed

Federal Child and Family Services Review (CFSR)

- ACF approved California to use our Case Review process, which means California will continue to do our own reviews
- ACF will have continued involvement in process, coming back in May to provide a third level of quality assurance for a subset of cases
 - They will continue to do site visits to counties and CDSS to strengthen our process, as well as attend trainings, such as the QA training in January

Next Webinar: Tuesday, January 12, 2016 2pm-3:30pm