

# ***North Carolina's School-Based Child and Family Support Team Initiative:***



## ***The Case Management System***



## Table of Contents

The CFST Case Management System .....	3
What’s New?.....	3
How to Use This Document.....	4
Key Terms of the Child and Family Support Team Initiative .....	5
Referral .....	5
CFST Team Meeting.....	6
LEAD Agency .....	6
How is the lead agency identified? .....	7
What are the lead agency’s roles?.....	7
Service Plan .....	8
Strength-based Interventions .....	8
Case Closed.....	8
Out-of-Home Placement .....	9
Case Management System (CMS).....	9
Obtaining a user name and password.....	10
Logging into the Case Management System .....	10
Text boxes.....	10
Getting familiar with the Case Management System .....	10
<b>Managing Your Profile</b> .....	12
<b>Referral</b> .....	14
<b>Team Meeting Form</b> .....	15
Appendix 1: Glossary of Parts of the Case Management System .....	19
Appendix 2: FAQ: Frequently asked Questions .....	26
Appendix 2: FAQ: Frequently asked Questions .....	26
Technical Issues .....	27
Appendix 3: CFST Contact Information.....	28



## The CFST Case Management System

The CFST case management system serves several functions.

First it captures legislatively mandated information including: the number of children served; demographic information on youth served; the reasons why students are involved in the CFST program; and the relationship between the CFST program and other state agencies who participate in the program.

Second, it helps the CFST leaders keep track of the students with whom they are working by providing a way to monitor the work that they do with each of the children they serve. It also allows CFST leaders to keep track of meetings, contacts with other agencies, and all follow-ups with the students with whom they are working.

Finally, the case management system provides information for the evaluation of the CFST initiative. Evaluation is important because it provides information about how the program is working. Based on the previous data entered by the CFST leaders, the evaluation team is analyzing the impact of the CFST program on academic achievement (measured through test scores, dropout rates, office disciplinary referrals) and out-of-home placements (measured by involvement with social service and/or department of juvenile justice and delinquency prevention).

### ***What's New?***

Returning CFST leaders are familiar with the first version of the case management system. This system was developed as the program was developed. Throughout the CFST initiative, a number of CFST leaders, LEA coordinators and school officials have provided valuable feedback about how to improve the system. In February 2008, the evaluation team held a focus group with CFST leaders from several LEAs. Based on those discussions and the earlier feedback, we have made a number of changes to the system. These include:

- The system is now needs driven  
All of the information funnels through student needs. Students are referred to the CFST program because they have unmet needs. Team meetings are scheduled to identify all of the student's needs and strengths and to develop a service plan to meet the students' needs. Services (or strength-based interventions) that meet the students needs are then determined. Follow-up occurs to determine whether the students are receiving the recommended services (or strength-based interventions) and to determine whether the services are meeting the needs that allow progress towards their goals.
- Home visits have their own tab.  
This tab captures simply whether the CFST leader(s) made a trip to the students home and the date of the visit.
- Case notes  
In the previous version of the system, the case notes were scattered in comment boxes



## North Carolina's School-based Child and Family Support Team

throughout making it hard to find information. Now the case notes are organized in one place. They are structured much like an email by having a date and a subject line as well as a body where more text can be written. These notes are really for the CFST leaders and will not be used by the evaluation team.

- **Optional Task List**  
This optional task list is designed to help you keep track of the various tasks (examples, call parents, schedule meeting, etc) you have for each of the student you are serving. You can create a to-do list for each student.
- **Reports you can generate (coming by the end of August 2008)**
  - **Child-level**  
You can now create a report summarizing all the work that you have done with a particular child. This document will have confidential written at the top and you should treat it as carefully any confidential document. This will allow you to print your notes and/or a summary of the student's needs, team meetings, services and follow-up information.
  - **Aggregate-level**  
You will now have the ability to see and produce a report on the number of referrals, team meetings, and other items from your school. You will be able to select a start and end date for the report. This is designed to help you and your supervisors.
- **Dates**  
Dates are now easier to enter because a little calendar appears to the right of the field.
- **Improvements in Navigation**  
The changes were designed so that it would be quicker and easier for you to find information on students in the system.

### ***How to Use This Document***

This manual is designed to help CFST leaders across all of the schools in the CFST initiative enter information consistently so that we can see how the program is working across school districts.

One of the lessons we have learned over the last two years is that it is important that for all 103 schools and 200 CFST leaders to use common definitions for CFST related terms. There will always be differences in practices and it is important to note that differences from one district to another do not necessarily mean that one district is doing better or worse. Instead they may reflect differences in implementation or priorities. But without common definitions we will not be able to see how those differences are impacting outcomes. For example, system A may choose to increase the number of students who are referred while system B may focus on ensuring that a smaller number of students are receiving the services from outside agencies. The evaluation team can not apriori predict which approach will lead to better results, but we would like to see how these strategies produce different kinds of outcomes. However, if data are not entered consistently, then the evaluation team will not be able to determine the kinds of impacts the program is having in different districts.



## North Carolina's School-based Child and Family Support Team

This manual defines and clarifies certain key concepts in the CFST process including referral, team meeting, strength-based intervention, lead agency, the roles of the lead agency and what it means to close a case. In addition to describing the case management system, the manual answers commonly asked questions regarding the data entry system and the CFST program.

Based on feedback from CFST leaders and LEA coordinators this manual contains definitions and instructions that should help CFST leaders enter information in a uniform fashion. Wherever possible the case management system has incorporated suggestions from CFST Leaders to create drop down menus to reduce the need for you to enter text. In addition, this helps unify the data collection so that the evaluation team can compare the CFST process across schools and school systems.

### Key Terms of the Child and Family Support Team Initiative

Many questions about the Child and Family Support Team (CFST) initiative involve the key terms used in the program.

#### ***Referral***

A referral occurs any time an individual, an agency, or a team member brings a concern regarding an at-risk student to the attention of a CFST leader. Referrals can come from any source including teachers, principals, school staff, neighbors, friends, parents, students, etc. After checking school records and/or talking to other staff, the CFST leader will decide whether the case is appropriate for **the CFST program. In EITHER case the CFST leader will enter that student referral into the case management system.**

If the CFST leader decides that another program within the school is better suited for the student's needs or that student should be immediately referred to DSS or to mental health, this would be noted on the student form under case close and actions taken (described in more detail below).

The referral form is designed to capture how many at-risk students are being referred to the CFST program and who is making those referrals.

The referral reason simply refers to the need that prompted someone to refer this at-risk student. The referral person may know a fair amount of history or may have just observed the student more withdrawn than usual. The referral reason most likely does not capture the full circumstances surrounding the student.

After receiving a referral and determining that the case is appropriate for the CFST program the CFST leaders may learn that the student in questions has additional issues than what prompted the initial referral. Through the CFST assessment process a richer understanding of the students and family's strengths and needs should emerge.



## North Carolina's School-based Child and Family Support Team

After contacting the parents and determining what they believe the students needs are, the CFST leaders should try to set up a *CFST Meeting*.

### ***CFST Team Meeting***

**"Child and Family Team meetings are times when family members and their supports come together to make and update plans to meet the needs of the student and family. The plans focus on the strengths of the student and family and speak to their needs, desires and dreams."**

North Carolina Collaborative

A CFST team meeting is an in-person meeting with at least the CFST leader and the student's parent or guardian. If the student is of an appropriate age and maturity he or she should also be included. The purpose of this meeting is to develop a plan to help the student achieve goals. During this meeting, the team will discuss the student's and family's strengths and develop a plan that builds upon these strengths. The team will also discuss the student's needs and goals and develop a service plan to help the student reach his or her goals.

The team will also identify the primary unmet need of the student. The primary unmet need is the most pressing need of the student. The primary unmet need should also help identify who the lead agency for this child is going to be. A number of other public agencies are now using child and family team meetings, so this process should be familiar to your agency partners. More information on how other agencies are using child and family teams can be found at <http://www.nccollaborative.org/>

### ***LEAD Agency***

According to the authorizing legislation, the primary unmet need of the student determines who is the lead agency for the student. The authorizing legislation states that:

*School personnel* shall take the lead role for those children and their families whose primary unmet needs are related to academic achievement.

*The local management entity* shall take the lead role for those children and their families whose primary unmet needs are related to mental health, substance abuse, or developmental disabilities and who meet the criteria for the target population established by the Division of Mental Health, Developmental Disabilities, and Substance Abuse Services.

*The local department of public health* shall take the lead role for those children and their families whose primary unmet needs are health related.

*Local departments of social services* shall take the lead for those children and their families whose primary unmet needs are related to child welfare, abuse, or neglect.



## North Carolina's School-based Child and Family Support Team

*The chief district court counselor shall take the lead for those children and their families whose primary unmet needs are related to juvenile justice issues.*

### **How is the lead agency identified?**

While the CFST leaders will usually call the first CFST meeting, based on discussion and agreement between the family and others who are involved in the case, the lead agency should be identified at the first CFST meeting.

CFST leaders and agency partners should develop clear criteria for choosing lead agencies. Disagreements or confusion are less likely when these are in place. Such criteria should include:

- What is the primary unmet need of the student or family?
- Which agency has main responsibility for addressing the child or family's primary need, including statutory responsibility?
- Which agency (if any) has a previous or potential ongoing relationship with the student or family?
- Does an agency have an ongoing responsibility to carry out an advocacy role for the student or family?
- Which agency has the skills and knowledge to provide a leadership and coordinating role in relation to other practitioners involved with the child, young person or family?
- Which agency has the ability to draw in and influence services?
- Which agency has an understanding of the surrounding support systems which are available to manage and sustain service provision?
- Which agency has capacity to take on the role?

While the CFST leaders may have ideas about who should be the lead agency, the final determination should occur at a CFST meeting in consultation with the family and other agencies.

### **What are the lead agency's roles?**

The roles of the lead agency are to:

- Schedule and arrange Child and Family Support Team meetings
- Build a trusting relationship with the student and family to secure their engagement and involvement in the CFST process.
- Ensure that the student and family remain central to any decisions made about them, providing the student or family with sufficient information to empower them to make their own decisions
- Ensure that there is a crisis plan in place for the family
- Use the outcome of the CFST meeting to:
  - ensure that the student and family are involved in agreeing to the CFST process and ensure that it is focused on the delivery of support
  - provide strengths based, solution focused services designed to remedy the student's primary unmet need
  - identify where additional services and other providers may need to be involved to meet other needs of the student and family



## North Carolina's School-based Child and Family Support Team

- Act as a key conduit and contact point between the student and family, and other practitioners involved in delivering more targeted and universal services
- Use the CFST process and team meetings to ensure that case progress is monitored, taking into account:
  - the changing circumstances and needs of the child, young person or family over time
  - progress made
  - the student's or family's experience of or satisfaction with services/support received
  - the views of other practitioners on the effectiveness of support
  - whether support or services should be changed and whether more specialist support may be required
  - whether the child or young person's needs have been met and they no longer require additional support
- Ensuring that where students and their families may require more specialist services:
  - the student and family continue to be supported while any more specialist assessments are carried out
  - an effective 'hand over' takes place when a new lead agency is required to deliver and co-ordinate the ensuing support.

**No matter whom the lead agency is, if the CFST Leaders are participating in a team meeting, the CFST leaders will still enter information about the meetings into the case management system. They should participate in the team meetings until the issues that brought them to the meeting are resolved. If those issues are addressed, if team meetings run by other agencies move on to unrelated issues, after consulting with the family, the CFST leaders can decide to close the case** (in other words, the other agency will continue their work but without the involvement of the school-based CFST staff).

### ***Service Plan***

A service plan is developed during a Child and family Team meeting to address the student's needs. The participants of the meeting are to develop the plan collaboratively and then sign the plan. For each strength-based intervention (i.e. service) that is listed on the plan, different individuals may take a lead role in ensuring that the student receives that service. For example, the student may be responsible for attending an after school program, the parent may be responsible for taking the student to a doctor, etc.

### ***Strength-based Interventions***

A strength-based intervention builds on the strengths of the students and family. All students and families have strengths. The goal of the CFST program is to identify strengths of the student and family and build upon those strengths. Examples of strengths could be family, good sense of humor, good work ethic, etc. There are an endless number of strengths.

### ***Case Closed***

The case close section is used whenever a student who has received a referral is no longer going to be monitored by the CFST leader(s). Referrals/cases are closed for a number of reasons.



## **North Carolina's School-based Child and Family Support Team**

Once students meet their objectives through this program and no longer need to participate the case should be closed. If for any reason the CFST leader decides not to take any additional action with the case, the case should also be closed. For example, sometimes the needs of students who are referred to the CFST program are better served by another program in the school or another agency all together. In this case, the student may never have even had a team meeting. Similarly some families may not want to be involved in this voluntary program or students may move away from the school.

In some cases students referred to the CFST program may already be receiving service from another agency and be part of another ongoing child and family team process. CFST leaders may work through that existing team. The CFST leaders may close the case if the issue that brought the CFST leaders into this process has been resolved, even if that existing team continues to meet on pre-existing or other issues. If it will help the child and family, the CFST leader can also chose to remain part of that process and keep the case open.

Understanding why students are no longer participating in the program will help to improve the program in the future.

### ***Out-of-Home Placement***

One of the key goals of the CFST initiative is to reduce out-of-home placements. There are several types of out-of-home placement that a youth may experience. Youth may be removed from home and placed into foster care by the department of social services. Youth may also be incarcerated due to illegal activity, admitted to an inpatient facility or group home for mental health reasons or admitted to a detox facility for substance abuse problems.

### ***Case Management System (CMS)***

The Case Management System (CMS) is the primary means of gathering legislatively mandated data on the CFST initiative. CFST leaders have access to information entered on students in their school. They do not have access to individual student-level data on students in other schools. The evaluation team, the state-level CFST coordinators and others outside your school system will never see the student names, or other student level information that you enter into the case management system.

Names are important because they will be used to link these records with other state data sets (such as education records at DPI).

(Confidentiality: At this point, you might wonder how we are keeping information confidential if we use names to link with records from other agencies. The data linking is done in a secure manner by individuals (not part of the evaluation team) working through the North Carolina Education Research Data Center (NCERDC). NCERDC uses a process approved by DPI whereby individual students in the CMS are assigned a unique identifier. This same process has been approved for use in a number of other national and state programs.

Information that uniquely identifies a student such as the student's name and birth date are stored separately from information about why the student was referred and the types of services that the student received. We will not go through all the technical details here but please believe that



## North Carolina's School-based Child and Family Support Team

many people have spent much time ensuring that individual privacy is respected. More details about NCERDC can be found at <http://www.childandfamilypolicy.duke.edu/ep/nceddatacenter/index.html> )

### ***Obtaining a user name and password***

The first step to using the Case Management System is to acquire a user name and password from the Duke Evaluation team. This can be achieved by having the CFST coordinator at your school send an email to Audrey Foster stating your name, position (nurse or social worker), school, and email address.

### ***Logging into the Case Management System***

Once you have your user name and password, go to the website for the case management system: <http://cfst.ssri.duke.edu>.

### ***Text boxes***

***Information entered into text boxes will not be included in the evaluation.*** They are for your convenience. **The fields that are most important for the evaluation tend to be the check boxes, drop down menus and dates as well as the student's name and birth date.**

**A number of CFST leaders and LEA coordinators requested that the case management system include** text boxes where you can write case notes and record other kinds of information you or your partner may need. You can enter 2000 characters of text in the note body of the case notes section. Most other text boxes hold 256 characters (2-3 short sentences).

## **Getting familiar with the Case Management System**

The section below includes screen shots from the case management system and walks you through entering a case.

The best way to become familiar with the case management system is to use it. CFST Leaders should log in and enter a case. If it is your first time entering data into this system, please enter just 1 or 2 cases, exit the system and then login again. This way you can make sure that things are saving the way you expect them to save.

We have tried to simplify the data collection and choose the fields that meet the mandates required by our enabling legislation. We must have this information to show the value of the work you are doing in this program.

The information you enter into the case management system will be used to generate reports showing how many children are being served and what kinds of services they are receiving. These reports will be available to you and to your supervisors.



## North Carolina's School-based Child and Family Support Team

The screen shots below will help you navigate through the forms in the Case Management System. Before entering information there are important rules you need to remember.

- 1) These are options continually used to add, edit, and to save data in the case management system.
  - a. **Select**- Visible only when in list view, this link opens a previously created form for editing and is used to navigate to a sub-section (ex. The meeting section has a sub-section for to record meeting invitees and attendees).
  - b. **Add New**- This option opens a new section to add new information in a student's case. It is also visible when in list view below the section index on the Student data Entry section. Sub-sections for the meetings section and the Service plan section will not be visible until after these sections have been created.
  - c. **Add**- This option is used for saving new information in a section and it visible after selecting the "add new" link. Once "add" is selected you will be routed back to the list view on the Student Data Entry section.
  - d. **Update**- This option is also used for saving information. It is available when editing a previously created section. Select "update" to save information into the section.—For your assistance saving details are listed through out this document.
  - e. **Cancel**- This option navigates you back to the list view on the Student Entry section. Note: Please make sure you "add" or "update" new information before using this option. If you do not we cannot guarantee the information will be saved.
  - f. **Delete**- **WARNING: DO NOT USE THIS BUTTON WITHOUT FIRST CONTACTING THE EVALUATION TEAM!** Deleted information cannot be recovered.
  - g. **Search**- This option navigates you back to the student list. It is the first link to the left on the Student Entry Section.
- 2) All dates must be entered in the following format: **1/1/2008**

### CASE MANAGEMENT SYSTEM:

<http://cfst.ssri.duke.edu>



Enter your  
username and  
Password.

Please Log In

User Name:

Password:

Log In

Select "log  
in" to enter  
into the case  
management  
system.



### Student List

This is the Student List Section. It contains all of the students served by the CFST leaders that have been entered into the system.

**School Assignment** → LEA: [Demo LEA] School: [Demo Middle School] Search [New Search]

**Click "select" to update data in a student's case.** → [Select] buttons in the table.

**Click here to "Add" new case** → [Add Student] button.

**Click here to "create/edit" your Profile** → [My Profile] button.

**Search for a student here. Enter his/her last name.** → Student Last Name input field.

LEA	SchoolName	Student	Student Status	SchoolYear	Grade	SpecEd Status	Status
Demo LEA	Demo Middle School	Smith, John	Currently in the school				Open
Demo LEA	Demo Middle School	Moister, Audrey	Currently in this school				Open
Demo LEA	Demo Middle School	Wash, Joel	Currently in this school				Open

**Status (Open/Close):**  
If a case should be closed and it appears as opened make sure all refer are closed on the case closed form and then refresh your screen.

### Managing Your Profile

If this is your first time into the system (or if you need to update your information) click the manage profile link located on the student list. Please fill out information about yourself. **This contact information is the contact information that the evaluation team as well as the state-level coordinators will use to reach you.**

School User - Add/Edit

First Name: [Argenti]

Last Name: [John]

User Name: [Argenti]

School: [Audrey's School]

User Status: [Active]

User Type: [Nurse]

Gender: [Male]

Race: [Caucasian or White]

Educational Status: [College Bachelors, Masters or Higher]

Ethnicity: [Non-Hispanic]

Date Hired: [1/1/2008]

Departure Date: [ ]

Number Of Months: [ ]

Provisional Status: [ ]

Phone: [ ]

Address 1: [ ]

Address 2: [ ]

City: [ ]

State: [ ]

Zip: [ ]

[Update] [Cancel]



## North Carolina's School-based Child and Family Support Team

Once you edit your profile click “update” to save and then click “cancel” to begin entering data on students.

### Student Entry Section

This is the “Student Entry” page. It is the first page you enter student data. It is also the first time you are able to view the case management sections. This page has three functions. The top portion of the page saves general information on a student. Once a student’s name has been entered into the Case Management System it will be visible on all forms. Also in The bottom portion of the page will have list views of information on needs, service plans, meetings, and other information populate by sections in the CMS.

Select “Search” to return to the Student List.

Please Remember to put ALL dates in this format 1/1/1990 to avoid error messages.  
*Please Fill-in all Fields.*

Click “update” to save information

Case Closed Section

**CMS Sections**

- Needs
- Service Plans
- Referrals
- Meetings
- Home Visits
- Out of Home Placement
- Case Notes
- Tasks

**CMS Section entries will appear here in “list view”.**

### Student Need Section

This is the Student Need section. It captures any direct or indirect factor (i.e. family situation) that causes a student to be at- risk for academic failure. Discovery of need(s) may be provided by a referring person or through the process of inquiring about the student’s case. **When a need is provided and it is determined “misidentified” please record this in the necessary field.**



# North Carolina's School-based Child and Family Support Team

## Student Need: Smith, John

Need Source:

Need:

Date Identified:

Date Resolved:

Need Comments:

Misidentified Need:  Yes  No

Please remember to put ALL dates in this format: 1/1/1990 to avoid error messages.

Enter information then PLEASE click "update" to save.

Click "Cancel" to return to the sections in CMS list view.

If a NEED is determined "misidentified" please record this in the necessary field.

## Referral

The Referral Form captures the reason for the student referral and contact information on the referring person's. NOTE: The needs selected on drop-down menu in the NEEDS form will self-populate to the referral form, therefore it is recommended that you enter the students needs on the NEEDS form before entering information on the referral.

## Student Referral: Smith, John

Referral Date:

Referring Person:

Title:

Agency:

Phone:

Relationship To Student:

Parent Or Guardian Notified:  Yes  No

Strengths Of Student And Family:

Student Need:

Please remember to put ALL dates in this format: 1/1/1990 to avoid error messages.

The student needs selected in the NEEDS form will self-populate as selections here.

Enter information then PLEASE click "update" to save.

Click "Cancel" to return to the sections in CMS list view.



## North Carolina's School-based Child and Family Support Team

### Team Meeting Form

This form captures team meetings that occur in relation to a student's case and the lead agency that is monitoring the case. If you attend a team meeting where you are not the lead, please record the meeting in this section.

**Student Meeting: Smith, John**

Meeting Date: 8/8/2008  
 Meeting Time: 1:00 PM  
 Meeting Status: Scheduled  
 Meeting Location: In Home  
 Meeting Location Other:  
 Primary Unmet Need: < Please Choose ...>  
 Lead Agency: School  
 [Update] [Cancel]

Select	Attendee Name	Did Not Attend
<input type="checkbox"/>	Mary Jane	False

Show Page: 1 (Total Records: 1) Records Per Page: 10  
 [Add Attendee]

**Annotations:**

- Student's Name (circled in green)
- Please remember to put ALL dates in this format: 1/1/1990 to avoid error messages.
- The options for Meeting Status (scheduled, completed, cancelled) will appear in list view on the Student's home page.
- When planning a meeting please enter the student's primary unmet need.
- List View of Attendees (circled in green)

Click here to "add attendee". Then enter information and click "add".

The attendees will be in list view on the Meeting form. To edit an attendee click "select".

**Student Meeting Attendee: Smith, John**

Attendee Type: Representative: LME  
 Attendee Name: Sarah Peters  
 Attendance: < Please Choose ...>  
 [Add] [Cancel]

### Service Plan

The service plan form needs to be completed for each service being provided since objectives maybe met at different points in time.



# North Carolina's School-based Child and Family Support Team

## Service Plan: Smith, John

Student Need: Health Factors: Dental

Date Service Plan: 8/8/2008

Desired Outcome: Limit tooth decay

Strength Based Intervention: Referral: Medical (private)

Lead Agency: Public Health

Target Date: 9/1/2008

The student needs selected in the NEEDS form will self-populate for selections here.

List View of follow-up

*NOTE: Each service that is being provided needs a service plan. For example, if a child needs glasses and counseling you will need a service plan for glasses and a service plan for counseling even if these plans occurred during the same team meeting. The reasoning is one service objective may be met while another is continuing.*

**Followup**

Followup Date	Barriers to Care	Improving Toward Goal	Intervention Rec'd	Date Of Services
<a href="#">Delete</a> <a href="#">Select</a> 8/26/2008	No Barriers	Improving	<input checked="" type="checkbox"/>	8/29/2008

Show Page: 1 (Total Records: 1) Records Per Page: 10

Click here to "add follow-up". Then enter information and click "add".

The attendees will be in list view on the Meeting form. To edit an attendee click "select".

## Service Plan Follow-up: Smith, John

Followup Date: 08-29-2008

Barriers To Care: No Barriers

Improving Toward Goal: Improving

Intervention Received:  Yes  No

Date Of Services: 08-29-2008

**Follow-Up on Recommended Services**

This information is intended to be filled-out within 3 months of the team meeting (however, the follow-up may occur much sooner).

## Home Visit

This form is intended to capture successful home visits with the parent/primary caregiver of the student. Options have been provided to record if the visited was completed or attempted. Attempted means a home visit was scheduled but the parent/primary caregiver was not available for purpose of the visit. **NOTE: A home visit may also be documented as a team meeting if a service plan is created to assist the student or student's family as a direct result of the home visit.**

## Student Home Visit

Date of Visit: 08-20-2008

Home Visit Comments: Need to drop off a form

Home Visit Status: Completed

The options for Home Visit Status (scheduled, completed, cancelled) will appear in list view on the Student's home page.

Click here to "add" home visit. Then enter information and click "add".



## North Carolina's School-based Child and Family Support Team

### Out-of-Home Event

This form is intended to capture the date of entry, length of stay, date of exit, and reason for out-of-home placements into the following service systems: Juvenile/Criminal Justice, Mental health/Health facility, Department of Social Services.

**Student Out of Home Event: Smith, John**

Out of Home Placement Event:  ← **Out of home Placement event**

Date Of Entry:  ← **Please make sure you fill-in the date in the following format: 1/1/1900**

Date Of Exit:

Days In Facility:

Reason:

**Click here to "update" an Out-of-Home Event. Then enter information and click "add".**

### School History

This field captures the students grade and special education status. Please make sure to complete these fields.

**School History: Smith, John**

School Year:

Grade:

Special Ed Status:  ← **If a student is NOT in Special Education please select "Not in Special Education" on the drop down menu. DO NOT LEAVE THIS FIELD BLANK.**

LEA:

School:

Other School Info:

**Click Here to "update" a student's School History.**

### Case Notes

This form is intended to capture textual details in a student's case. It was created for the convenience of the CFST leaders and LEA coordinators to record additional information not being evaluated by the CFST initiative. To assist with ease of use this form is formatted similarly to an email. A drop down menu with a selection of case note types has been provided to assist



## North Carolina's School-based Child and Family Support Team

with organization. The note body can hold up to 2000 characters. *This form is not being used for evaluation purposes.*

**Student Case Note: Smith, John**

Note Date:

Note Type:

Note Subject: 

Note Body:

User Name:

A list of note types are provided for convenience

The note body is 2000 characters

Your user name will be recorded for reference

Click Here to "update" case notes.

### Tasks

This form has been provided for your use only. It is not being used for evaluation purposes. It is to assist you with your day-to-day CFST responsibilities. It is equip with a fields for a task due date, a task description, and task status.

**Student Task: Smith, John**

Due Date:

Task Description:

Task Status:

Completion Date:

Click Here to "update" Tasks.



## Appendix 1: Glossary of Parts of the Case Management System

**Academic Factors:** (CMS) Located on the drop-down menu for the subheading Need Category (on the referral form, the need form, and the service plan form), this refers to needs that may hinder a student's ability to succeed academically in school. These factors may be the issues that lead the student to be referred or issues determined during a team meeting (not necessarily a complete list of all issues that the student faces).

**Add New:** (CMS) This button is an option on each of the case management forms. It allows you to open a new case and/or enter new data into the case management system based on the form selected. Please be sure to select "insert" to save the data before exiting the form.

**Agency:** (CMS) Located on the referral form as a textbox, this sub-heading captures the agency for whom the referring person works (if applicable).

**At-Risk groups:** Groups or populations who, due to a certain common existing economic, social, and environmental factors or behavioral characteristics, may be prone to a certain disease or condition.

**Barriers to Care:** (CMS) Located in the service plan form under follow-up. This drop-down menu captures limitations to providing a strength-based service for a student. If no barriers exist please select "No Barriers" in this field.

**Case Close Comments:** (CMS) Located on the Student Entry form, this text box provides a place to write additional comments as to why the case closed.

**Case Close:** (CMS) Referenced on the Student Entry form, it describes why a referred student is no longer being monitored by the CFST initiative. The date of the case close is important because it gives a time frame from when the student was referred to when the case closed.

**Case Notes Form:** (CMS) This form is intended to capture textual details in a student's case. It was created for the convenience of the CFST leaders and LEA coordinators to record additional information not being evaluated by the CFST initiative. To assist with ease of use this form is formatted similarly to an email. A drop down menu with a selection of case note types has been provided to assist with organization. The note body can hold up to 2000 characters. *This form is not being used for evaluation purposes.*

**Case Management System:** A data-based that stores information on students served by the Child and Family Support team initiative. This system serves at least 2 purposes. First it provides a way for the CFST leaders to keep information on students that they are working with and second it provides a means for administrators to monitor the CFST program.

**ChangePassword:** Located in "my profile" on the student list page, select the "change password" link. Enter your current password and then enter a new password. **NOTE: All passwords must be a seven characters with atleast one symbol.**



## North Carolina's School-based Child and Family Support Team

**Close Reason:** Located on the Student Entry form, this drop-down menu identifies the reason why the CFST leaders are no longer working with this student (ex. Objectives met, student moved, parent refused). A text field for case close comments is provided to record additional details.

**Date:** (CMS) All dates in the case management system MUST be entered in the following format: MM/DD/YYYY. When a date is entered incorrectly an error message will appear. A calendar option is available to the right of each date field.

Calendar Note: the *outside single arrows* toggles through the months; and the *inside double arrows* toggles through the years. To discontinue using the calendar select close.

**Date Closed:** (CMS) Located on the Student Entry form it captures the date the case was closed on a student. The date of the case close is important because it gives a time frame from when the student was referred to when the case closed. A calendar option is available to the right of each date field.

**Date of Entry:** (CMS) Located on the Out-of-Home Event form, this sub-heading captures the date the student entered into the out-of-home placement facility. *If the date is unknown please provide an estimation of the date.* All dates in the case management system MUST be entered in the following format: MM/DD/YYYY. When a date is entered incorrectly an error message will appear. A calendar option is available to the right of each date field.

**Date of Exit:** (CMS) ) Located on the Out-of-Home Event form, this sub-heading captures the date the student left the out-of-home placement facility. *If the date is unknown please provide an estimation of the date.* All dates in the case management system MUST be entered in the following format: MM/DD/YYYY. When a date is entered incorrectly an error message will appear. A calendar option is available to the right of each date field.

**Date of Referral:** (CMS) Located on the Referral form, this sub-heading captures the date the referring person referred the student to the Child and Family Support Team. All dates in the case management system MUST be entered in the following format: MM/DD/YYYY. When a date is entered incorrectly an error message will appear. A calendar option is available to the right of each date field.

**Days in Facility:** (CMS) Located on the Out-of-Home Event Form, this field captures the total number of days the student was in event facility. This field will self populate based on the date-of-entry and the date-of-exit.

**Delete:** (CMS) This option erases a record from the case management system. When information is deleted it can not be retrieved. **A safety feature has NOT been installed to decrease accidental deletions. Only use the delete button to remove information you entered erroneously.**

**Edit:** (CMS) This link is an option on each of the forms ONLY when in list/index view. Selecting this link located at the far left of previously added entries allows for quick form modification to the list/index without having to open the selected form.

**Ethnicity:** Ethnic affiliation or distinctiveness such as Hispanic or non-Hispanics.



## North Carolina's School-based Child and Family Support Team

**Event:** (CMS) Located on the Out-of Home Event form, this sub-heading is a drop down menu intended to capture placement types of student being served by the CFST Initiative when applicable. One of the major goals of the CFST initiative is to increase home permanency.

**Faith-based Intervention:** (CMS) Located on the Service Plan form in the dropdown menu for Strength-based intervention. These are programs affiliated or implemented by a religious organization of a church, temple, mosque, or other places of worship. It includes charitable contributions such as soup kitchens, clothing closets, shelters and other necessities for living when the available selections do not apply.

**Follow-up on Recommended Services:** (CMS) Located within an established Service Plan This form is intended to be completed approximately three months after a service plan has been created for a student. It captures if the service(s) have been provided, the date of service if applicable, the barriers to care if applicable, and if there has been improvement towards the goal. NOTE: The follow-up form is only visible after selecting "select" in the list view of the Service Plan Form.

**Health Factors:** (CMS) Located on the drop-down menu for the subheading Need Category (on the referral form, the need form, and the service plan form), this refers to health factors that may hinder a student's ability to succeed academically in school. These factors may be the issues that lead the student to be referred or issues determined during a team meeting (not necessarily a complete list of all issues that the student faces ex. Pregnant/parenting).

**Home Visit Form:** (CMS) This form is intended to capture successful home visits with the parent/primary caregiver of the student. Options have been provided to record if the visited was completed or attempted. Attempted means a home visit was scheduled but the parent/primary caregiver was not available for purpose of the visit. NOTE: A home visit may also be documented as a team meeting if a service plan is created to assist the student or student's family as a direct result of the home visit.

**Improving Towards Goal:** Located within the student's service plan on the follow-up form, this drop-down menu documents the process of improvement a student is making as a result of receiving a strength-based service. A service may be discontinued when the student has met the objective has been met or a student's case has been closed. It is common to have multiple follow-up before all objectives have been met.

**Instructions:** (CMS) This link provides a simple overview of the case management system to assist CFST team members in getting started.

**Intervention Received:** Located on the Follow up form, It captures if an intervention has taken place for the student or his family if applicable.

**Invitees and Attendees:** (CMS) Located within the Meeting Form at the bottom half of the screen, this section is intended to capture who was invited to the team meeting(s) and if they attended

**LEA:** This is the district where your school resides.



## North Carolina's School-based Child and Family Support Team

**Lead:** Located on the Service Plan Form it refers to who is taking the lead in facilitating the strength-based service.

**Locked out:** This means that someone has entered your username and the wrong password more than 3 times. If this happens you are locked out of the system and you will need to contact Audrey Foster or Beth Gifford to be unlocked. (try Audrey first).

**Log Out:** (CMS) This link is located at the bottom left of the web page. It takes you out of the case management system and ensures that no one can see your data without logging back into the system.

**Manage Profile:** (CMS) Located on the student entry page, this option allows you to edit your personal information for the CFST initiative such as your email address, phone number, or password.

**Meeting Date:** (CMS) Located in the Meetings form to capture a meeting held in relation to the student case. The meeting date is also displayed on the Meetings list for reference once a meeting has been added to the case management system. All dates in the case management system MUST be entered in the following format: MM/DD/YYYY.

**Meeting Form:** (CMS) This form captures general information (date, time, location,) and logistics (Primary unmet need, Lead Agency, invitees/attendees) for Team Meetings held in relation to a student's case. A team meeting may occur during a home visit if a service plan is created as a result

**Meeting Location (Other):** (CMS) Located on the meeting form, this drop down menu obtains values to capture where the CSFT meeting was held (In home, At school, Other please specify).

**Meeting Status:** (CMS) Located on the meetings form it captures the status of meeting in a student's case (ex. cancelled, completed, scheduled). The status of entered meetings will be visible in list view under the meetings section.

**Misidentified Need:** These are needs based on referrals that CFST leaders do not find valid. NOTE: though that particular need was wrongly diagnosed, CFST may determine other needs that are valid to keep the case open, when applicable.

**Need:** (CMS) A need is any direct or indirect factor (i.e. family situation) that causes a student to be at risk for academic failure. It may be provided by a referring person or through the process of CFST leaders assessing the student's case.

**Need Source:** (CMS) Located on the Need form, this drop-down menu captures if a need was provided through an incoming referral, a team meeting or other. *If "other" is the best selection for this field please do not hesitate using that selection.*

**NC WISE Number:** Located on the Student Entry form this text field will assist the evaluation team in matching students to the Educational Data sets.



## North Carolina's School-based Child and Family Support Team

**Note Date:** (CMS) Located on the Case Notes Form, all dates in the case management system MUST be entered in the following format: MM/DD/YYYY. When a date is entered incorrectly an error message will appear.

**Note Subject:** (CMS) Located within the Case Notes Form, this is a text field in the case management system to capture the title of your case note. It holds up to 50 characters. *This text field is not being used for evaluation purposes.*

**Note Body:** (CMS) Located within the Case Notes Form, this is a large text box in the case management system and holds up to 2000 characters. *This text field is not being used for evaluation purposes.*

**Note Type:** (CMS) Located within the Case Notes Form, this is a drop down menu that provides a list of case note options. The selections for note type are: General information, Back up Plan for Crisis, Home visits, Meeting Notes, Student health note, Referral, and Service related.

**Out-of-Home Event Form:** (CMS) This form is intended to capture the date of entry, length of stay, date of exit, and reason for out-of-home placements into the following service systems: Juvenile/Criminal Justice, Mental health/Health facility, Department of Social Services.

**Primary Unmet need category:** Located on the meeting form this captures the most pressing need when planning a team meeting for a student

**Provisional Status:** Provisional status indicates that the CFST leader social worker or nurse has additional coursework to complete or must pass the qualifying examination in order to become either a licensed school social worker or a nationally certified school nurse.

**Race:** (CMS) According to the Office of Management and Budget (OMB) the revised standards for federal data on race and ethnicity, the minimum categories for race are now: American Indian or Alaska Native; Asian; Black or African American; Native Hawaiian or Other Pacific Islander; and White. In accordance with the Census, Hispanic is not a race but rather an ethnicity. It is possible to be of any race and also Hispanic. *PLEASE NOTE: Hispanics may be defined as any race depending upon how they self identify.*

**Referral Form:** (CMS) This sub form captures general contact information (Date of Referral, Referring person, Title, Agency, Phone, Relationship to student) for the person who referred the student and provides their rationale for referring the student to the CFST initiative. To capture the referring person's perception of strengths associated with the student and family a text field has provided.

**Relationship to Student:** (CMS) This field appears on the Referral form and on the Meetings form as a pull down menu. Please select the appropriate title that connects the student to the referring person on the Referral form and the invitee/attendee on the Meeting form.

**School:** (CMS) This inaccessible field contains the school assignment of the CFST team members provided by the evaluation team. It is visible within the Student tab on the Student Data Entry Page.



## North Carolina's School-based Child and Family Support Team

**Select: (CMS) Located on all of the case management forms – opens form view to make modifications in form**

**Service Plan Form: (CMS)** This form has a dual purpose. It is intended to capture the student's needs discussed at the team meeting, the desired obtainable goal(s) for the student that includes the agency whom is the lead, and a target date for implementing the service plan that was accomplished during the CFST Team meeting. The second purpose of this form is reserved for follow-up information. Follow-up information should be filled in at subsequent team meetings or as new information becomes available.

### **Social Service Factors:**

**Special Education Status: (CMS)** Located on the School Year form. This field asks whether the student has an official individualized education plan and is served under the Individuals with Disability in Education Act (IDEA).

Strength-based Intervention:

**Strengths of Student and Family: (CMS)** The theoretical core of the Child and Family Support Team model is that everything is strength based. All students and families have strengths. Building upon strengths will help students and families achieve their goals. Examples of strengths could be supportive family, good sense of humor, good work ethic, etc. There are an endless number of strengths. Two areas have been provided to capture this information for your purpose.

Referral form-reported from the referring person  
Case Notes- reported from team observations

**Student Entry Form:** This form is the first page data is entered into when a new student is added to the system. This will be the most viewed and used form in the CMS. The Student Entry form has three purposes. 1) It is intended to capture demographic information about a student. 2) It is the form used for closing a student's case. And 3) it provides a list view and access to each of the forms located in the CMS. .

**Student Status: (CMS)** Located on the Student Entry form this drop down menu captures the status of the student with whom you are working (Currently in this school, No longer in this school. *When closing a case please also change the status of the student.*

**Target Date: (CMS) Located on the Service Plan Form**

**Task Form: (CMS)** This form has been provide for your use only. It is to assist you with your day-to-day CFST responsibilities. It is equip with a fields for a task due date, a task description, and task status.

**Title: (CMS)** This field appears on the Referral form. It references the title of the referring person.



## North Carolina's School-based Child and Family Support Team

**Type of Meeting:** (CMS) This field appears on the Meetings form as a drop down box. The most common use for type of meetings is to capture Team Meetings. The other options are: Other, and Nurse Assessment.

**User ID:** (CMS) Before gaining access to the case management system the CFST team member must be issued a User ID from CFST evaluation. Not only does it give access when accompanied with a password into CMS it also allows the user to request a new password if it is forgotten.

DRAFT



## Appendix 2: FAQ: Frequently asked Questions

### **What information do I enter into the Case Management System?**

A couple of different questions regarding this issue have come up. First, we are NOT concerned about you entering “too many cases”. The case management system is the only way we have to document the work you are doing. For some services provided, all of the forms are not necessary. For example, you may help a student get glasses (and do a lot of work) but never actually have a team meeting. You would fill out a referral, a service plan form and a case close form but never fill out a team meeting form. (Remember the model is about team meetings but the model doesn't necessarily fit every single scenario that you face).

Also, regarding meetings—please enter information regarding team meeting where the CFST leader is the lead or attends the meeting. **You do not need to enter phone calls, interviews with teachers, etc.** Please only describe team meetings where the CFST leaders are active participants regardless of whether they are the lead or not.

### **Where can I save a large amount of text that I'd like to write on the student?**

The case notes section holds 2000 characters in its note body.

### **Why isn't Hispanic/Latino an option under race?**

In accordance with the Census, Hispanic is not a race but rather an ethnicity. It is possible to be of any race and also Hispanic.

### **What happens when a student moves from one school to another?**

When a student moves to another school, the current case is closed. It is now technically possible to transfer a student from one school to another in the case management system however we are working on the protocol to do so. Please contact your LEA coordinator with the student's name, current school and new school. Please note that most schools in the state do not have the CFST initiative so transferring is only possible to other CFST schools.

### **I have data from last year and I want to know what I should enter first, this year's or last year's .**

Data entry is a requirement of our legislation and the ability for you to enter data is extremely important. It is important to not get any further behind. Continue to enter current data while making time to enter data from the previous year. PLEASE NOTE: School administration will receive reports on the data you have entered in to the case management system.

**If I have two needs that are provided by one referring person, would I enter the referring person twice?** No, enter the referring person once and the most pressing need in the referral. The CMS captures issues on the Needs form.



## Technical Issues

### **I just entered a student but I don't see their name in the student list.**

If this happens you may need to refresh the screen (control r). Sometimes, your machine will remember how the same web link used to look. In order to update the webpage you may need to press "control r" to refresh the screen.

### **When I log into the case management system I need to scroll all the way over to the right of the screen.**

This has to do with your screen resolution. You can avoid this problem by increasing the resolution on the screen. On a windows machine this is accomplished by going to your "control panel" then clicking on the icon that says "Display" and then clicking on the tab that says "settings". Finally, there will be a place that says "screen resolution". You move the arrow to more pixels. Please note, your screen will go black for a few seconds as it reconfigures.

### **The link to the case management system works on my computer at home but not the one at school.**

If you are able to get to the case management system on one machine but not another or by following a set of links one way but not another way, it is possible that there is a firewall on your system that is blocking you. If there is a firewall, you won't even be able to get to the website where the case management system is located. To solve this you will need to talk to the technology people at your school.

### **I forget my password**

If you forget your password you can have new one sent to you via email through the system. Go to the login screen and enter your userid in the lower portion of the screen and click submit. The system will automatically send you a new password. If you do not receive a password it means one of a few things. First, if the information in your profile is incorrect, the system may have the wrong email address for you. Second, it is possible that your spam filter is eating the email (you can probably look in your spam box to see if this is the case). Third, you may be locked out. This means that you entered your username incorrectly 3 times. Email Audrey and she can reset your username.

### **I requested a password but it was not delivered to my email address**

The first thing you should do is check your spam and trash email boxes to see if the email went there. If that fails then please contact Audrey Foster (contact information below) and she will help reset this information for you.

### **I can not update my version of internet explorer**

Internet explorer is the best web browser in which to view the case management. However, some CFST leaders in some schools are restricted to an older version of internet explorer. If this is the case for you, the case management system also can be viewed in Opera which is a free web browser that can be downloaded at [www.opera.com/](http://www.opera.com/). Depending upon how your computer is set up, you may need your IT person to install the software for you.



## Appendix 3: CFST Contact Information

### State-level CFST Coordinator:

*Tony Troop,*

School Based Child and Family Coordinator

Phone: 919 -707-5516

Email: [Tony.Troop@ncmail.net](mailto:Tony.Troop@ncmail.net)

*Cathy Daniels,*

School Based Child and Family Support Initiative

DHHS-Office of Secretary

Phone: 919-707-5605

Fax: 919-870-4828

Email: [Cathy.Daniels@ncmail.net](mailto:Cathy.Daniels@ncmail.net)

Mailing Address: Children & Youth Branch  
Mail Service Center 1928  
Raleigh, North Carolina 27699-1928

### CFST Evaluation:

*Beth Gifford, PhD*

Beth is the principal evaluator for the CFST evaluation. She prefers to be reached via email and checks avidly. She realizes that some conversations are easier over the phone, but if you want to call, call Joel first.

Phone: 919-613-9294

Email: [beth.gifford@duke.edu](mailto:beth.gifford@duke.edu)

*Joel Rosch, PhD*

Joel is a key evaluator on the CFST project. He also obsessively checks his email, but is a people person who welcomes phone calls. His main expertise is in public policy and studies how organizations deliver services to citizens.

Phone: 919 – 613-9291

Email [jbrrosch@duke.edu](mailto:jbrrosch@duke.edu)

*Audrey Foster*

Audrey handles much of the day to day work. She is very friendly and very knowledgeable about this project. She is the first person to contact regarding data entry and resetting passwords.

Phone: 919-613-9307

Email: [alfoster@duke.edu](mailto:alfoster@duke.edu)

Mailing Address: Center for Child and Family Policy  
Duke University  
Box 90264  
Durham, NC 27708

Fax: 919-684-3731