CFTM Data Entry Instructions for CWS/CMS

Case Plan Notebook, Case Management Services

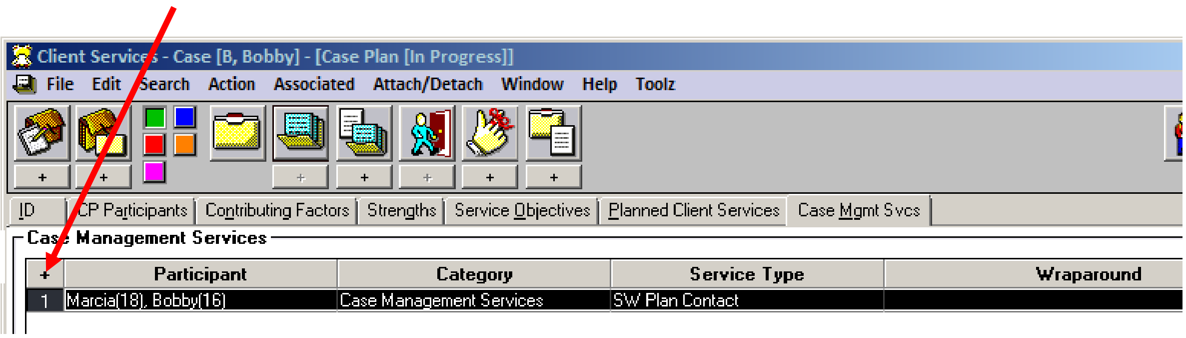
Instruction: Add CFT as a Case Management Service

When documented in the Case Management Services tab, CFTs appear on the final Case Plan in the "Agency Responsibilities" section. This documents the agency's responsibility to provide a CFT.

In the Case Plan Notebook, on the Case Management Services tab, Child and Family Team has been added as a new Case Management Services Category.

1) Click "+" to bring up the dialog box.

1.

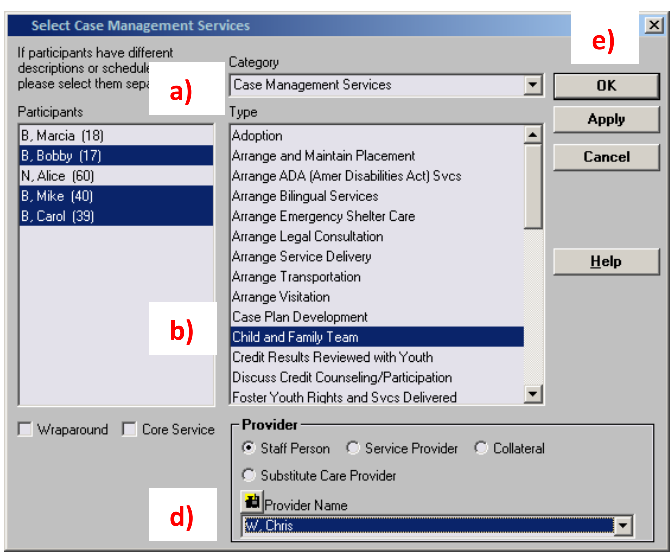


a) Under the Category drop down menu, select Case Management Services.
b) Under the Type drop down menu, select Child and Family Team.
c) Select the participants from the participants list.

d) In the "Provider" frame, select "Staff Person."

e) Click "OK."

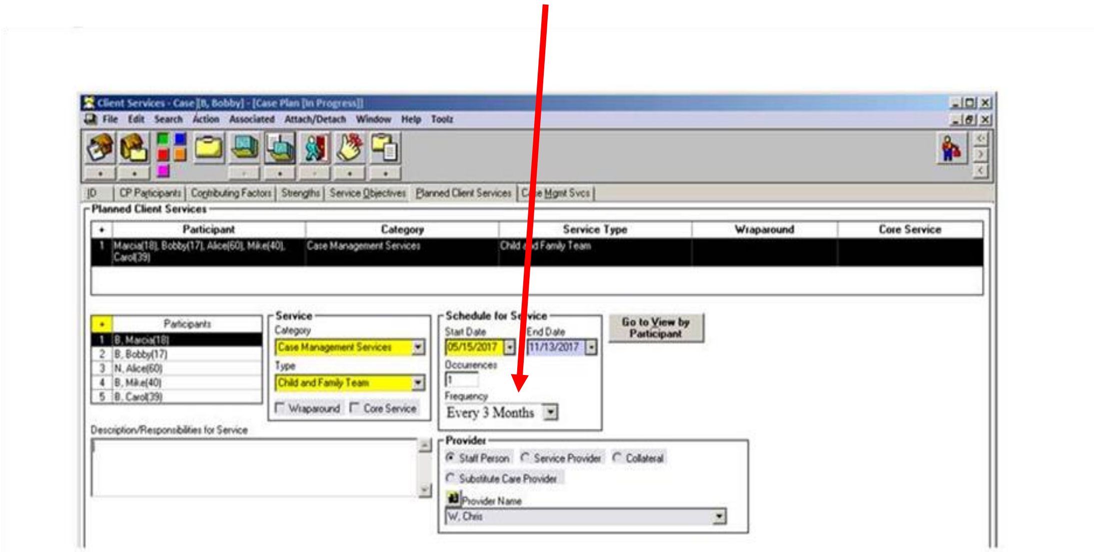
c)



2) Complete the "Schedule for Service" frame.

a) Occurrences must be "1" or more.

b) Frequency must be a minimum of "Every 3 Months."



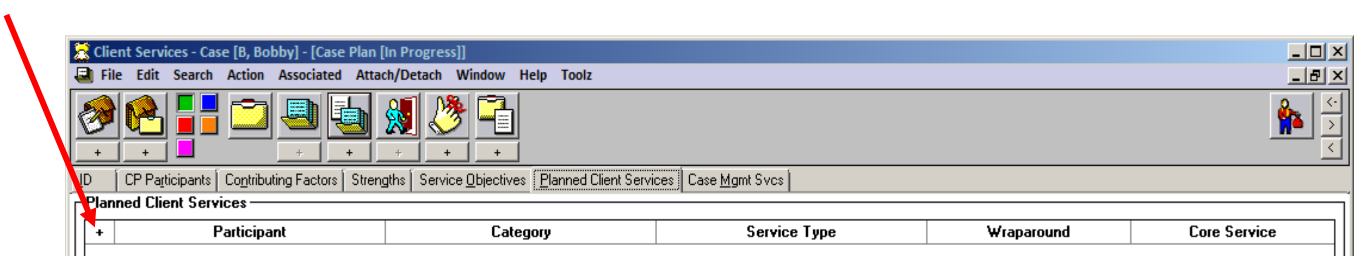
Note: CFT meetings may occur more frequently. For example, if the needs of the child, youth, or NMD and family are such that CFT meetings are planned to occur on a monthly basis, then "monthly" should be selected on the "Frequency" drop down menu.

Case Plan Notebook, Planned Client Services
Add Child and Family Team as a Planned Client Service

When documented in the Planned Client Services tab, CFTs appear on the final Case Plan in the "Client Responsibilities" section. This documents the family's responsibility to participate in the CFT process.

On the Planned Client Services tab, Case Management Services has been added to the Category dropdown menu in the Select Planned Client Services Participants dialog box.

3) Click the "+" to bring up the dialog box. The new service type of "Child and Family Team" is available after the Case Management Services category has been selected:



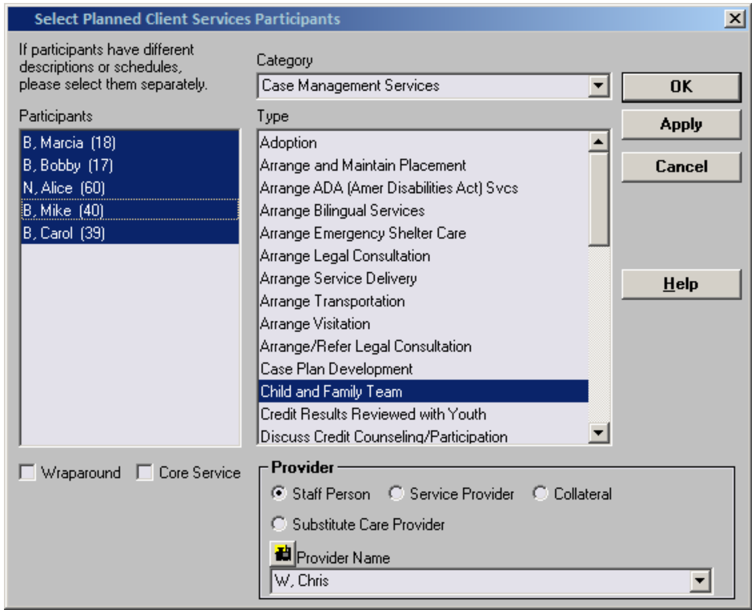
a) Under the Category drop down menu, select Case Management Services.

b) Under the Type drop down menu, select Child and Family Team.

c) Select the participants from the participants list.

d) In the "Provider" frame, select "Staff Person."

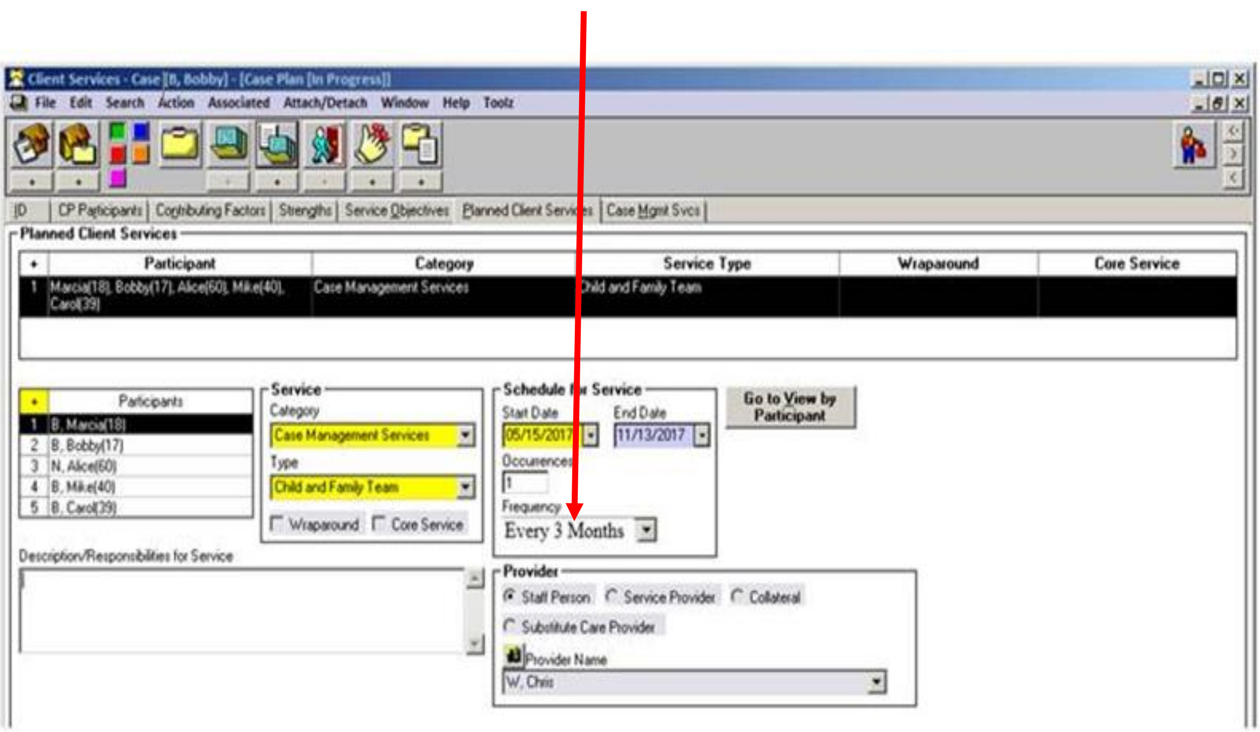
e) Click “OK.”



4) Complete the “Schedule for Service” frame.

a) Occurrences must be “1” or more.

b) Frequency must be a minimum of “Every 3 Months.”

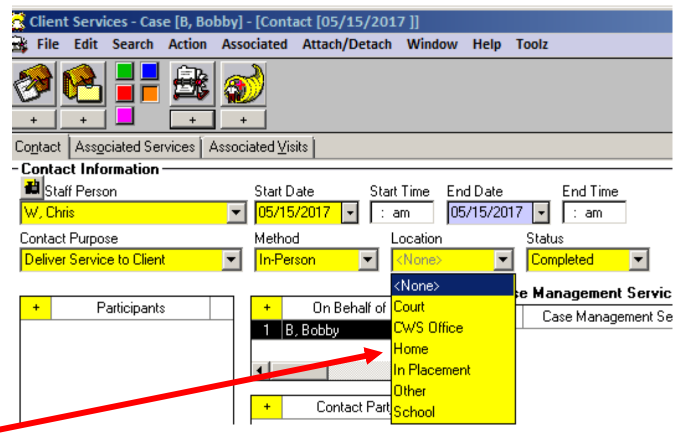


CFTM Data Entry Instructions for CWS/CMS

Contact Notebook: Documentation of Family Engagement Efforts Prior to Individual Child and Family Team (CFT) Meetings

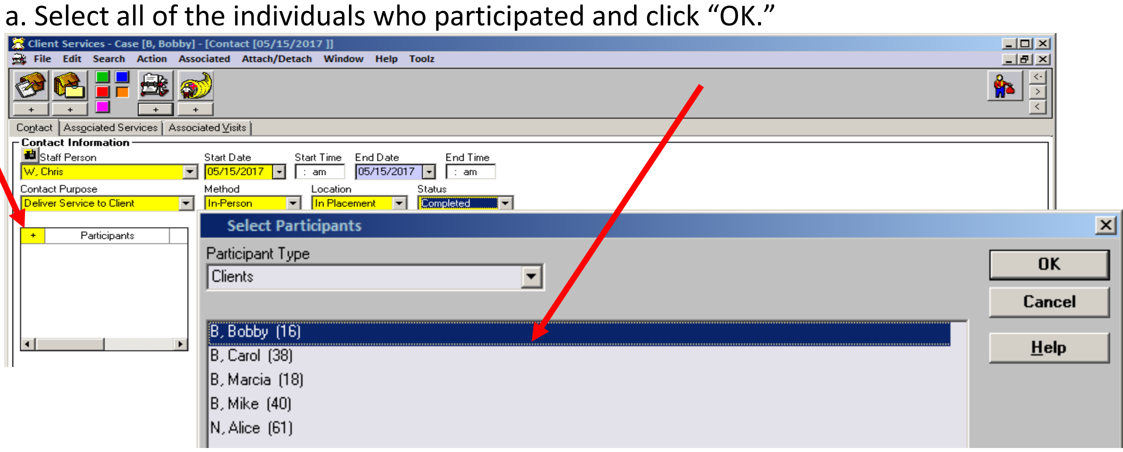
*County social workers and probation officers should meet individually with children, youth, nonminor dependents (NMDs), and families prior to the meeting to help them understand the CFT process and prepare them to participate in the CFT meeting. CFTs are more likely to be effective when children, youth, nonminor dependents, and families understand the process and their role in it. These **Family Engagement Efforts** prior to a CFT meeting must be documented in the Contact Notebook.* Note: If the meeting is held for an Emergency Response referral, enter the information in the Contact Notebook of the referral and follow the same instructions below.

1. Create a new or update an existing contact with the following information:
   a. Staff Person
   b. Start Date, Time
   c. End Date, Time

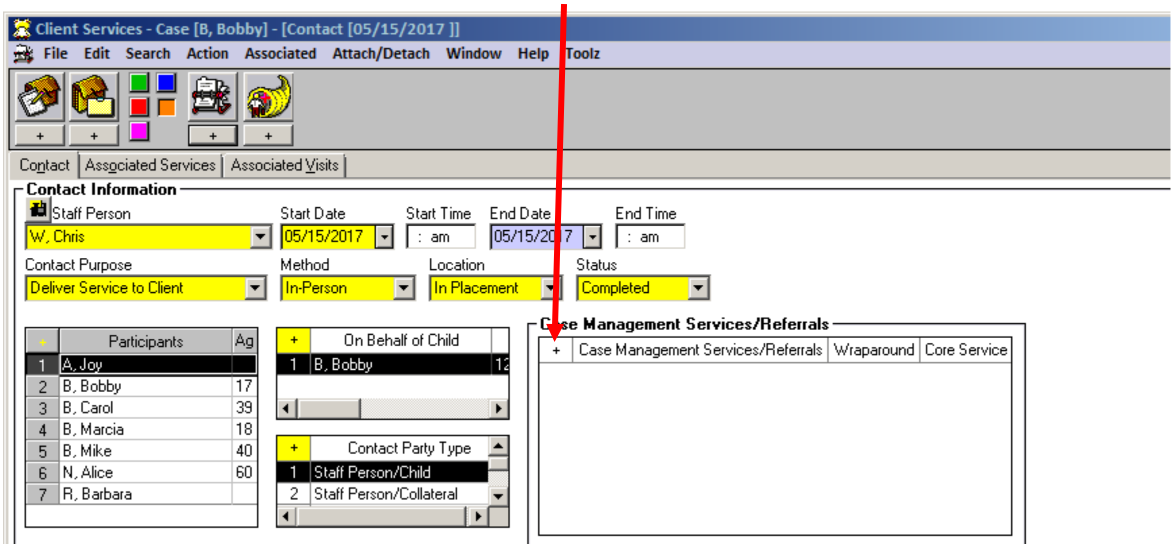


2. The fields at right should be completed as shown:
   a. Contact Purpose: Deliver Service to Client
   b. Method: In Person
   c. Location: In Placement or Home (*ideal*)
   d. Status: Completed (*required*)
      i. Status must be recorded as "Completed"

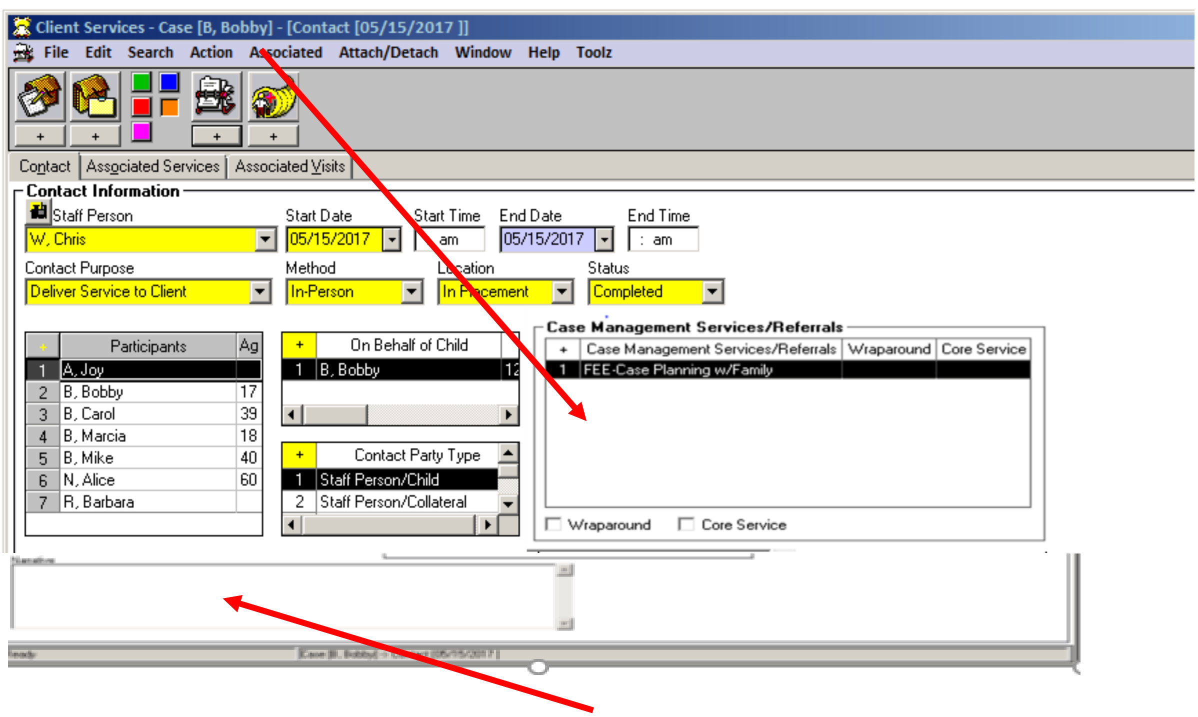
3. Open "Select Participants" dialog box by clicking "+."
   a. Select all of the individuals who participated and click "OK."



4. Complete the Case Management Service/Referrals Frame
   a. Click on "+" to open the case management services list.



b. Select "FEE-"Case Planning with Family."



Enter the family engagement efforts in the Narrative field and click "OK."

The Associated Services fields will be pre-populated.

Contact Notebook
Context: Individual CFT Meetings (CFTMs)

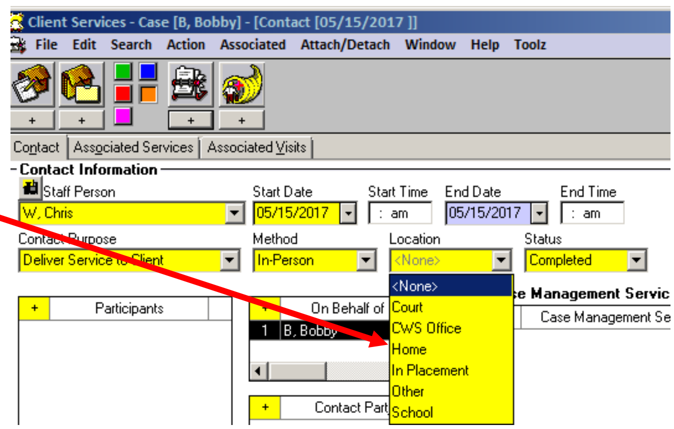
Individual CFT meetings are in-person meetings, and at minimum include the identified child, youth, or nonminor dependent, family members, others identified by the family, the child's current caregiver, and the assigned child welfare social worker and/or probation officer. If the child, youth, or nonminor *dependent also receives services from a community-based provider or other system, they should also be included in the CFT process.*

Documentation of Individual CFT Meetings

Individual CFT meetings must be documented in the Contact Notebook with an Associated Service. The meeting should address the needs of all the siblings whenever possible and the contact/meeting is on behalf of all siblings in the family. If the meeting is held in Emergency Response, staff should enter the information in the Contact Notebook of the *referral* and follow the same instructions below.

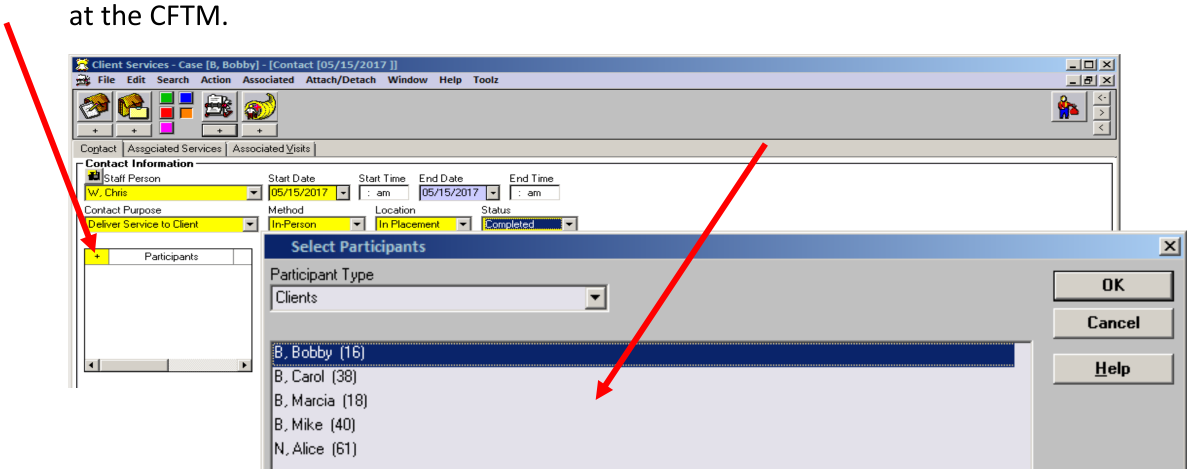
1. Create a new or update an existing contact with the following information:

    a. Staff Person
    b. Start Date, Time of CFTM
    c. End Date, Time of CFTM

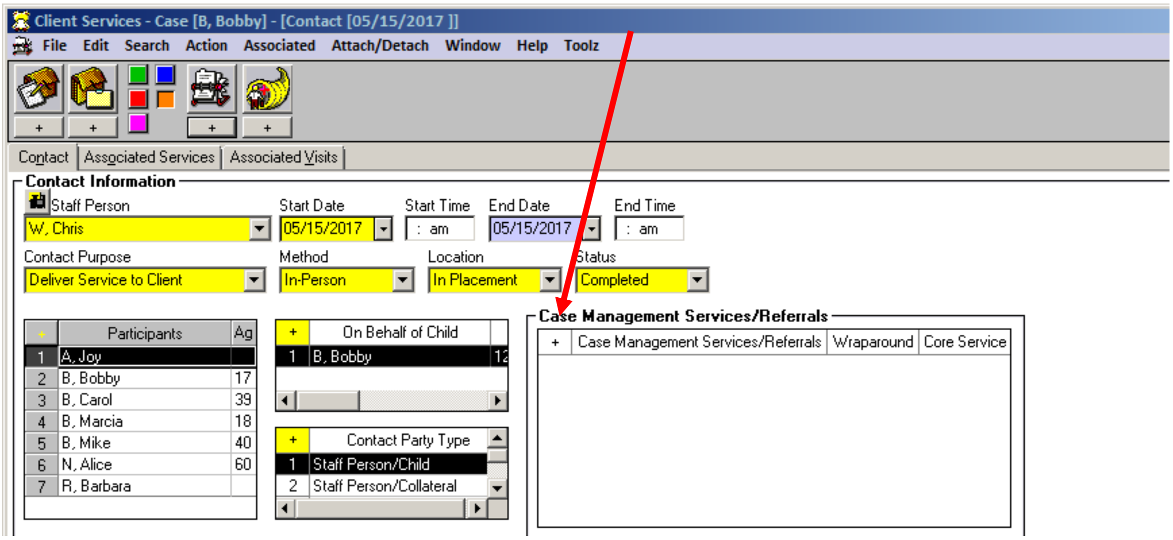


2. The fields below should be completed as shown:
    a. Contact Purpose: Deliver Service to Client
    b. Method: In Person
    c. Location: In Placement or Home (*ideal*)
        i. CFT meetings should take place in a convenient setting that maximizes family member participation.
    d. Status: Completed (*required*)
        i. Status must be recorded as "Completed"

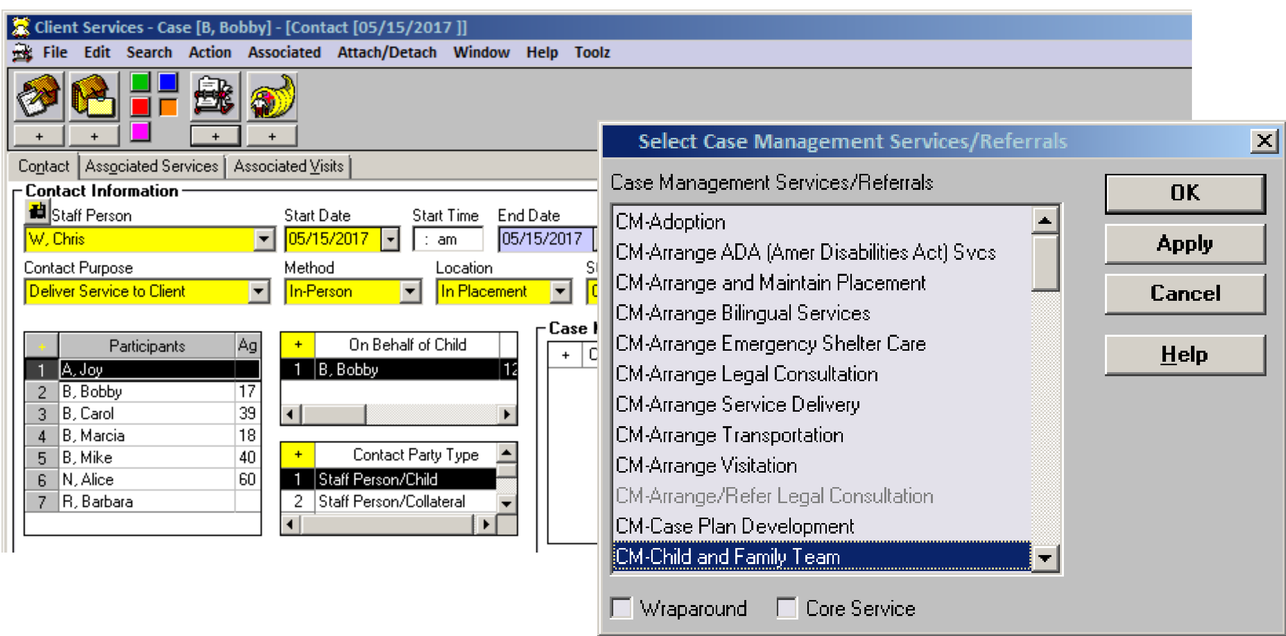
3. Open "Select Participants" dialog box by clicking "+."
    a. Select all of the individuals who participated in the CFT meeting and click "OK."
    b. A single contact for multiple siblings who were discussed at the CFTM may be created in the Contact Notebook using the "On Behalf of Child" dialog box. Only select the child as a participant if s/he was present at the CFTM.



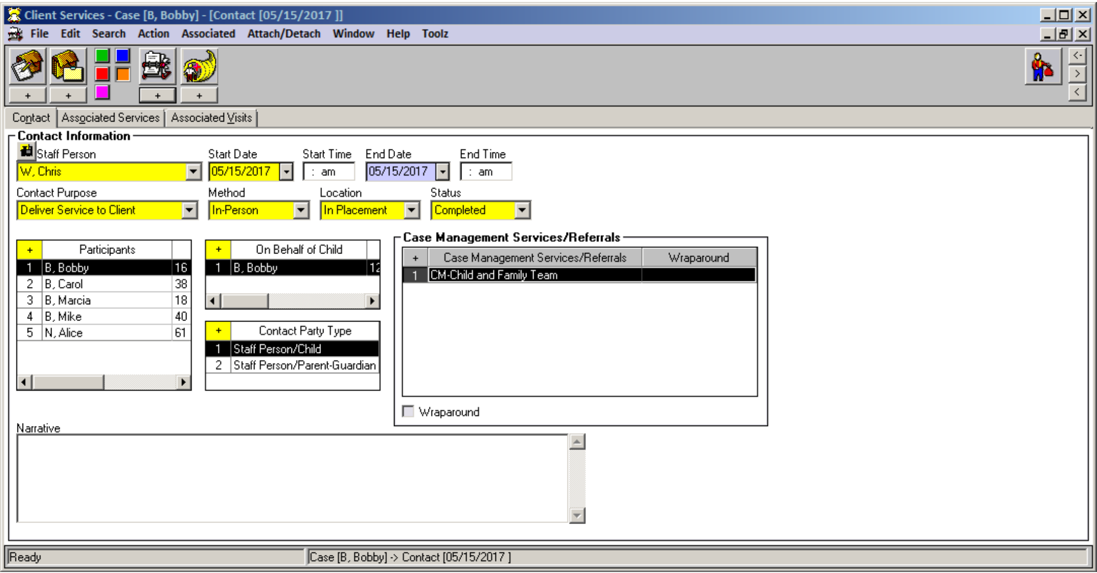
4. Complete the Case Management Service/Referrals Frame
    a. Click on "+" to open the case management services list.



b. Select “CM-Child and Family Team” and click “OK.”



5. Contact appears as shown:



Contact Notebook

Context: Individual CFT Meetings as an Associated Service

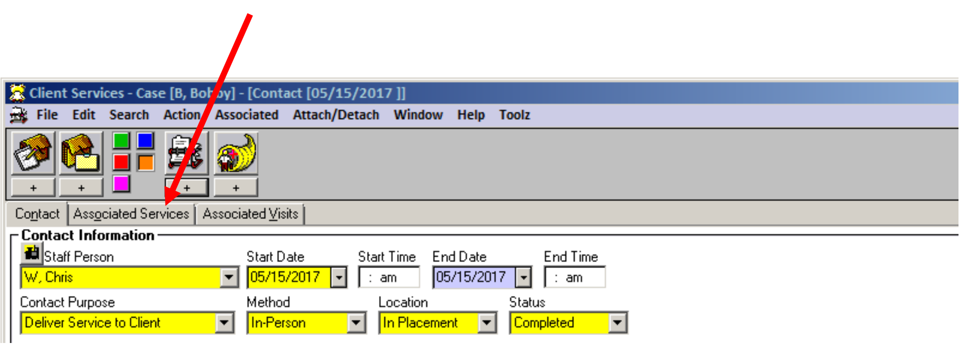
Documentation of an individual CFT meeting is incomplete until an Associated Service has been attached to it. This documents the county agency responsible for convening the CFT meeting, and also records the Key Roles associated with those who attended.

Contact Notebook

Add Individual CFT Meeting as an Associated Service

Individual CFT meetings must be added to a Contact as an Associated Service to document the Lead Agency involved and the Key Roles attending and participating in each meeting.

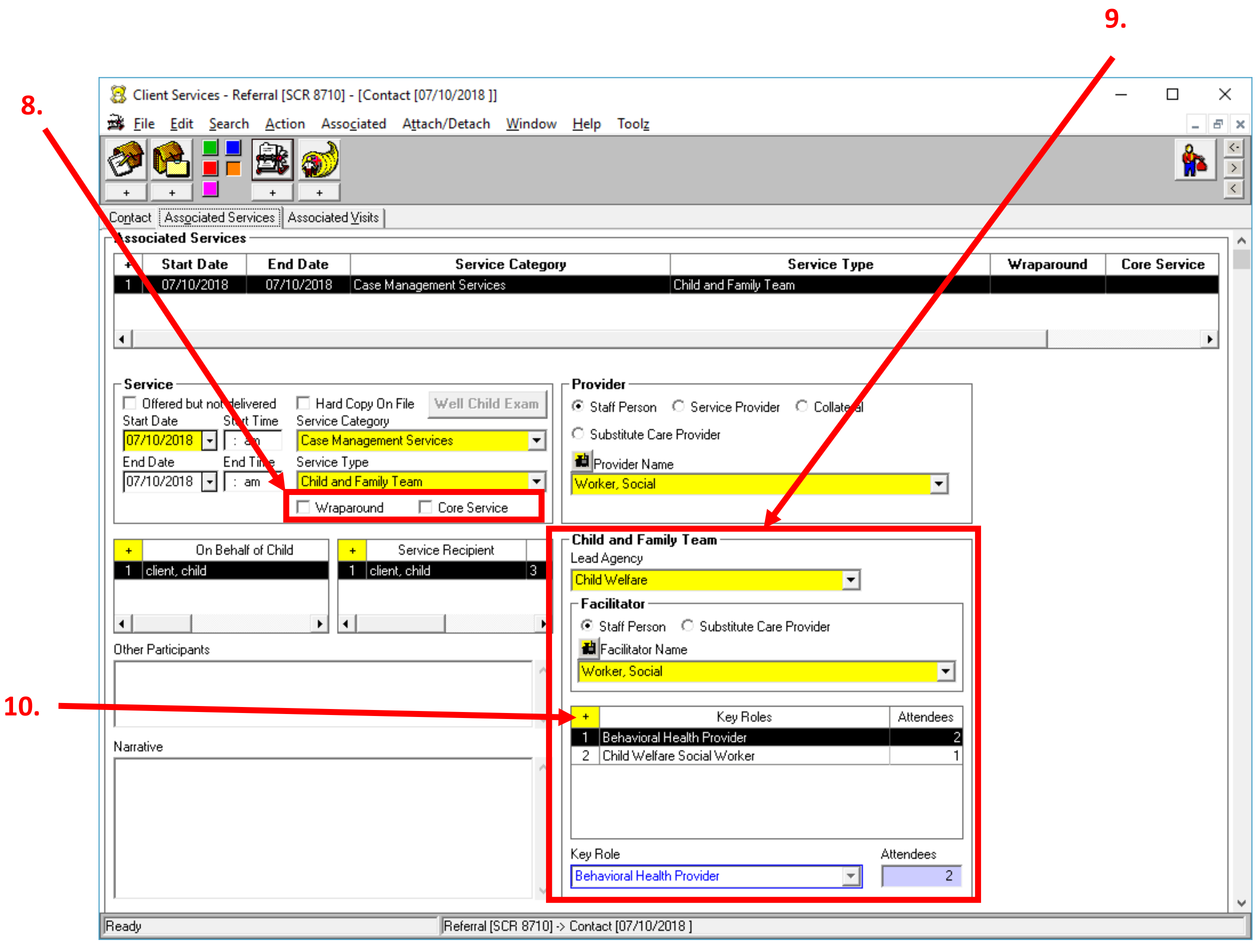
6. Click on the “Associated Services” tab.



7. Most fields will be pre-populated.

8. When documenting CFT meetings that occur as part of the child’s/youth’s Wraparound plan, click the “Wraparound” checkbox in the Service frame. If a child or youth is receiving services that meet the definition of [Core Services] ([WIC, Section 11463(b)(5)(A-F)]), click the “Core Services” checkbox in the Service frame when documenting CFT meetings that occur as part of that Core Service.

9. Complete the Child and Family Team frame by selecting the Lead Agency (see #12 for details), Facilitator Name and role (if staff person or substitute care provider), and Key Roles information.



10. Click on the "+" to open the "**Key Roles**" dialog box. From list of available roles, select all of the Key Roles who attended the individual CFT meeting being documented.

a. Multiple roles may be selected, and several roles may have multiple attendees selected for each role (see table below). A single contact for multiple siblings who were discussed at the CFTM may be created in the Contact Notebook using the "On Behalf of Child" dialog box, and one (1) Associated Service may be used for all the siblings.

b. Key Roles are not assigned to particular individuals involved in the case. Each Key Role selected is recorded as having attended the specific CFT meeting being documented.

c. Select **Key Roles** according to the definitions shown in the following table:

Key Role at CFTM	Description
a) Behavioral Health Provider* *Please always select this role for a representative of the county Mental Health Plan*	Supports the child, youth, nonminor dependent, and family by bringing a trauma-informed, clinical perspective to the team about the mental health status of the child, youth, or nonminor dependent.

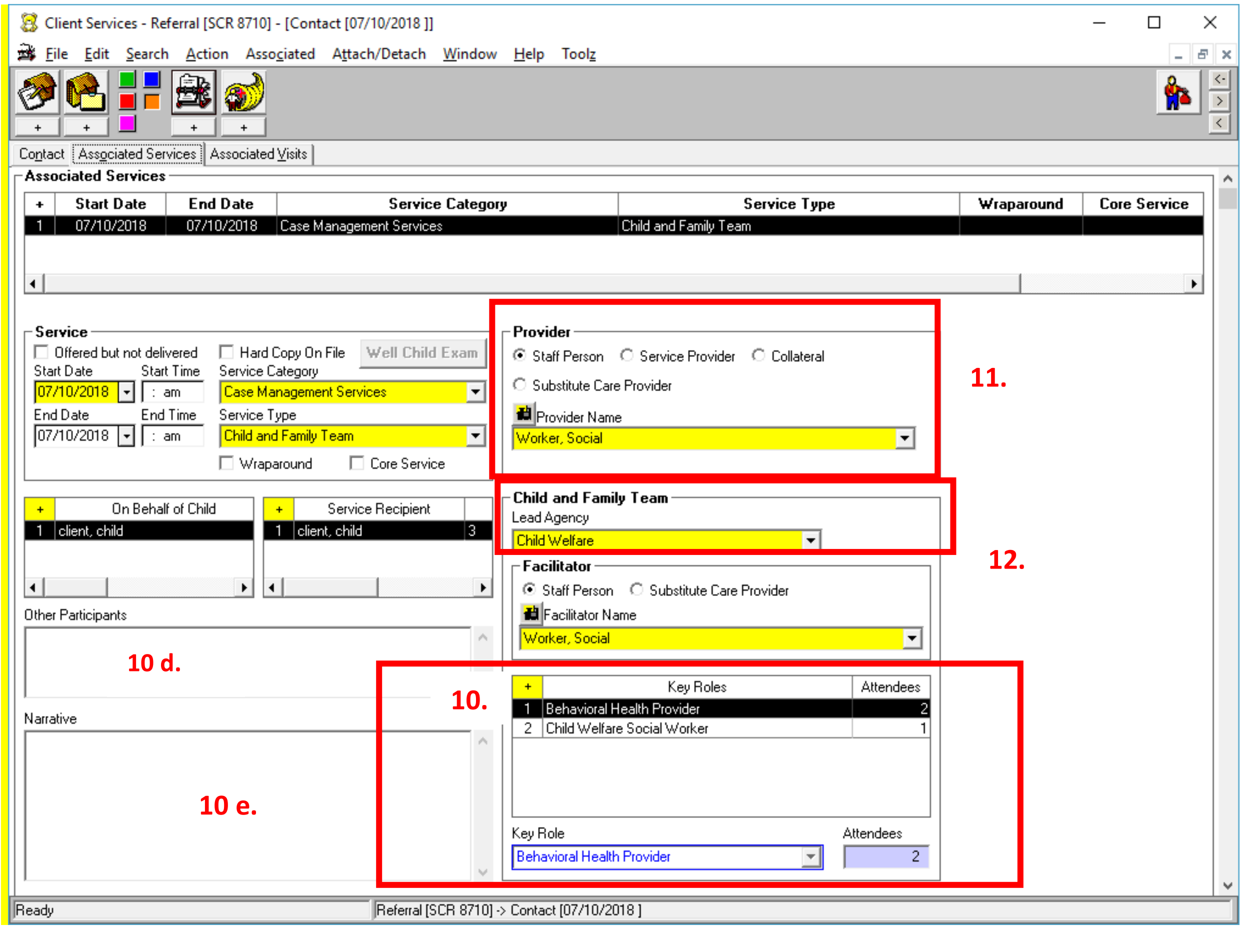
b) Child	The identified child, youth, or nonminor dependent (Note: only select if the child was present at the CFTM).
c) Child Welfare Social Worker	The assigned child welfare social worker of the identified child, youth, or nonminor dependent. This role was modified with CWS/CMS 8.4 to allow multiple attendees to be recorded.
d) Clergy	Any recognized representatives of a church or other faith organization.
e) Court Appointed Special Advocate (CASA)	An individual who advocates independently on behalf of a child, youth, or nonminor dependent, and is appointed by the court to ensure they live in an environment free from abuse and neglect.
f) Education Partner	Any representative of the identified child's school or academic achievement efforts.
g) Education Rights Holder	Person responsible for making education decisions in the child's best interests. The Education Rights Holder may be the child's parent, caregiver, legal guardian, or someone else appointed by the court. The Education Rights Holder cannot be the child's social worker, probation officer, attorney, STRTP/group home staff member, or school staff member.
h) FFA Staff	An individual from the Foster Family Agency that supervises the identified child or youth's placement.
i) Natural Support*	People or organizations identified by the child, youth, nonminor dependent, or family as important. Natural supports are a family's relationships and connections within their community, enhancing safety and diminishing loneliness and isolation. Examples include friends, neighbors, etc.
j) Other Community Support*	Individuals that an identified child, youth, nonminor dependent, or family may invite to be a team member, such as the youth's swim coach, girl scout leader, or softball teammate, for example.
k) Other Family*	Family members not reflected in one of the other roles.
l) Parent Partner	Individuals with lived experience who provide support and advocacy to parents whose children have been removed, helping them understand and navigate the system and encouraging them through the process.
m) Probation Placement Officer	The assigned deputy probation placement officer.
n) Regional Center Provider	Representatives of a Regional Center provider of developmental health services.
0) Resource Parent*	Substitute care provider.
p) Short Term Residential Therapeutic Program Staff	Representative from the STRTP where the identified child or youth resides.
q) Therapist*	The therapist providing services, but may also be used to mean any other mental health provider serving a child, youth, nonminor dependent and family.
r) Tribal Representative*	Representative from the identified child's, youth's, nonminor dependent's, or family's Native American tribe.
s) Youth Partner	Individual who works directly with the identified child, youth, or nonminor dependent to help them understand and navigate the process, and encourage them to participate and work with the team.
t) Bio Father	Birth father of the identified child, youth, or nonminor dependent. Do not use this role for a parenting youth or parenting nonminor dependent. (Note: The role of Parent/Father was deactivated with CWS/CMS 8.4).
u) Bio Mother	Birth mother of the identified child, youth, or nonminor dependent. Do not use this role for a parenting youth or parenting nonminor dependent. (Note: The role of Parent/Mother was deactivated with CWS/CMS 8.4).
v) Facilitator	The facilitator of a CFT meeting. This individual may be a service provider or a CWS/CMS staff person.

w) Sibling*	Sibling of the identified child. This role was modified with CWS/CMS 8.4 to allow multiple attendees to be recorded. Note: this key role does not apply to siblings on the "On Behalf Of" field; e.g., adult siblings
x) Other Parent/Guardian*	This role was modified with CWS/CMS 8.4 to allow multiple attendees to be recorded.
y) Substance Use Disrdr	This role was added with CWS/CMS 8.4.
z) Trtmnt Professional*	This role was modified with CWS/CMS 8.4 to allow multiple attendees to be recorded.
aa) Supervisor	The supervisor of the assigned child welfare social worker for the identified child, youth, or nonminor dependent. This role was modified with CWS/CMS 8.4 to allow multiple attendees to be recorded.

*** The number of attendees for this role may be greater than one (1).**

d. Anyone whose role at the CFT meeting is not identified in the list above may be added to the "Other Participants" dialog box (see 10.d). Other Participants will not be tracked.

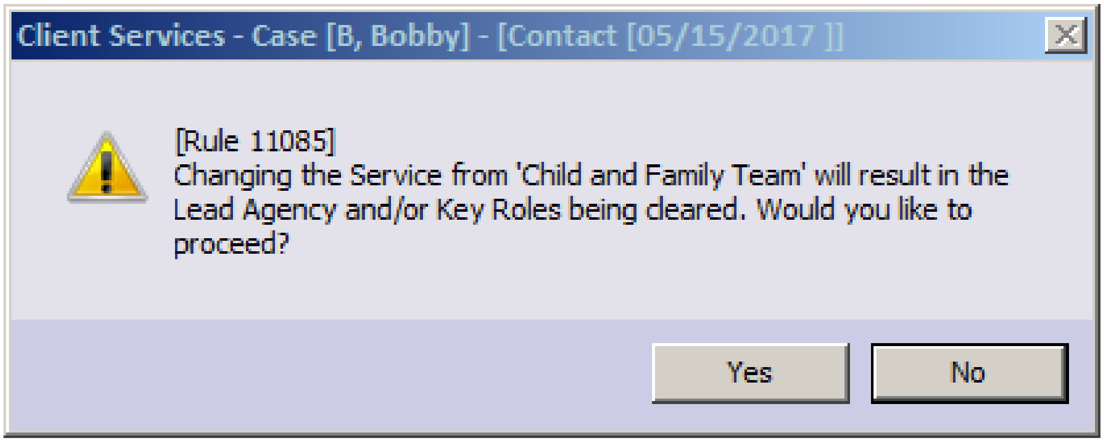
e. A description of the content/topics of the CFT meeting, including family goals, tasks/action steps, non-negotiables and agreements, challenges/worries/needs, achievements/strengths, outcomes, etc., are added to the "Narrative" field (see 10.e in below screenshot). If the facilitator is a service provider or staff member who cannot be located in the search field, the narrative field can also be used to note if a service provider acted as a CFT Facilitator ***. If a child/youth/NMD did not attend, indicate the reason****.*



11. In the Provider frame (see above screenshot, 11.), select the CFTM provider in the Provider Name drop-down menu, and click the radio button corresponding to that individual's role as a Staff Person, Service Provider, Collateral or Substitute Care Provider.

12. Select the "Lead Agency" (*county agency*) responsible for convening the CFT on behalf of the child/youth/NMD (select "Child Welfare" for foster care/dependency cases and "Probation" for probation/ delinquency cases).

Please Note:
When working in the Associated Services tab, if the Service Type is changed to a value other than "Child and Family Team," information entered in the "Key Roles" and "Lead Agency" fields will be cleared. A dialog box with the following message will be displayed:



Local Reports and Documents Reflecting CFT Documentation:

Local Reports

1. **Case Plan, Individual Client Responsibilities**
   When documented in the Case Plan Notebook as described previously in this document, Child and Family Team planned services will appear on the Individual Client Responsibilities report in the Client Responsibilities section under Case Management Services.

Documents

1. **Case Plan & Case Plan Update (Agency Responsibilities)**

   Documentation of CFT as a Case Management Service in the Case Plan Notebook, as described on page 1 of this document, will be reflected as an agency responsibility in the Case Plan and Case Plan Update documents. The information will appear in the Agency Responsibilities section, under Case Management Services.

2. **Case Plan & Case Plan Update (Client Responsibilities)** Documentation of CFTs as a Planned Client Service in the Case Plan Notebook, as described beginning on page 2 of this document, will be reflected as a client responsibility in the Case Plan and Case Plan Update documents. The information will appear in the Client Responsibilities section, under Case Management Services.

3. **Delivered Service Log**
   A new checkbox has been added to the Delivered Service Select Filter when printing the Delivered Service Log. The checkbox is enabled when the "Services" box is checked. The Delivered Service Log will reflect CFTs as a service, and include the CFT Lead Agency and

Key Roles – plus any narrative – that were documented in the Contact Notebook for each documented CFT meeting.