JARVIS Provider Portal - Guidance for Providers

The Provider Portal in JARVIS is the location for Provider staff to document Casework Contact Notes, Life Skills Assessment scores, Critical Incidents, Family Connections, and upload reports for services and placements.

HHS staff have read-only access to the Provider Portal and receive automated notification from the system when Critical Incidents are entered or when documents are uploaded.

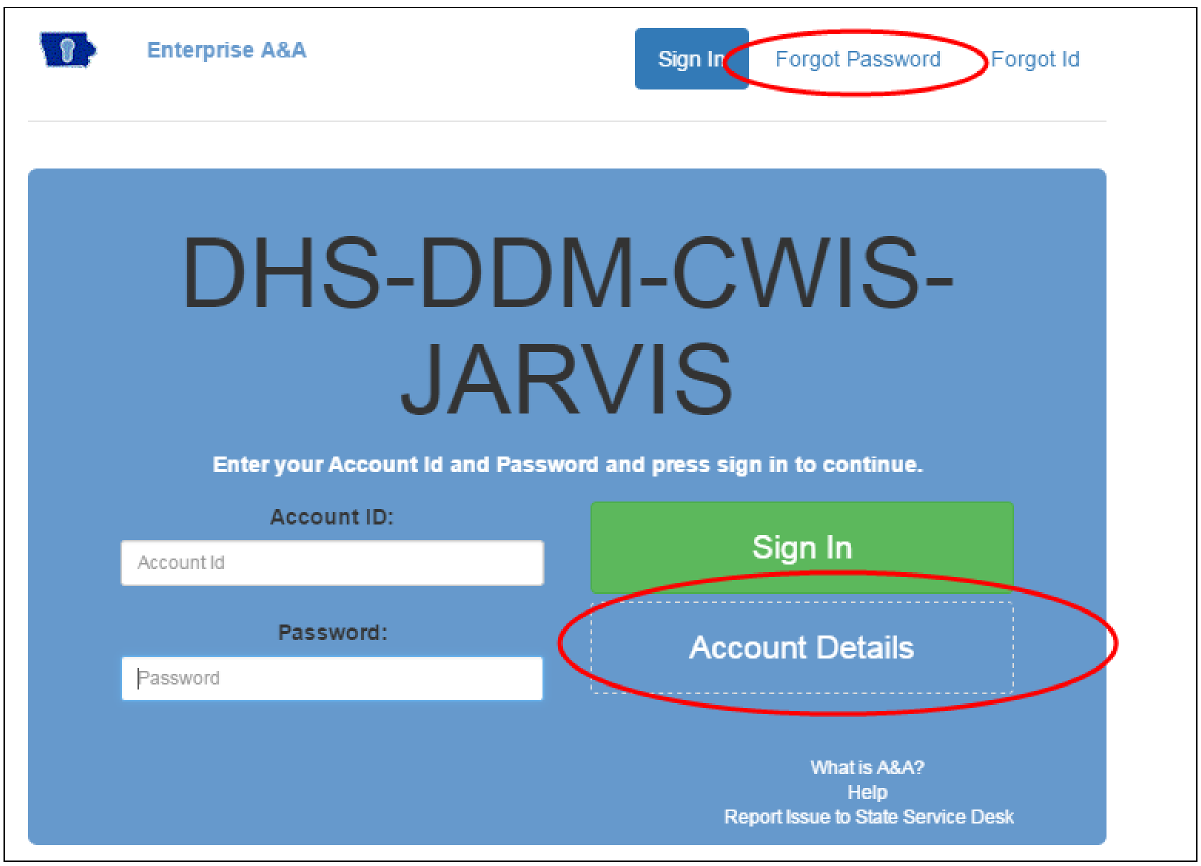
The Provider Portal can be accessed at https://secureapp.dhs.state.ia.us/cwis_jarvis/ via Microsoft Edge browsers.

NOTE: Make sure the settings are set to allow pop-ups in Microsoft Edge using the steps below.

- Click on the 3 vertical dots on the top right corner of the Google screen
- Select Settings
- Click “Cookies and site permissions” on the left menu
- Click “Pop-ups and redirects”
- Toggle to the left on Block to allow pop-ups

Accessing the Portal

To access JARVIS, enter login credentials on the Enterprise sign in page.



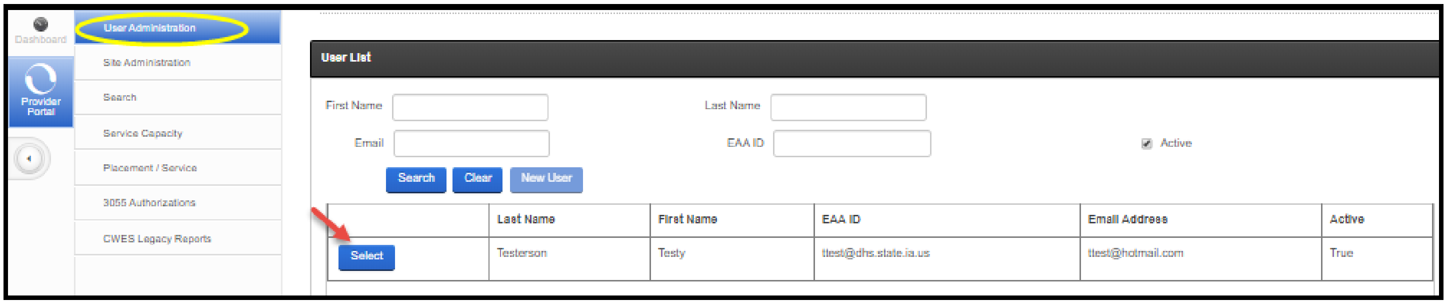
Account ID - Enter your ID in format *firstname.lastname@iowaid*.
Password - Enter the same password you use to sign onto your computer on a daily basis unless directed otherwise.

To change account details, enter your login information and click on the “Account Details” button. Click “Forgot Password” to retrieve your password.

User Administration

Designated Provider Administration staff have access to the User Administration tab in order to maintain a list of active staff members from their agency. Only active members from your agency will display on the User List.

To locate a worker, scroll down the User List or use the search feature and then click “Select” next to the record.



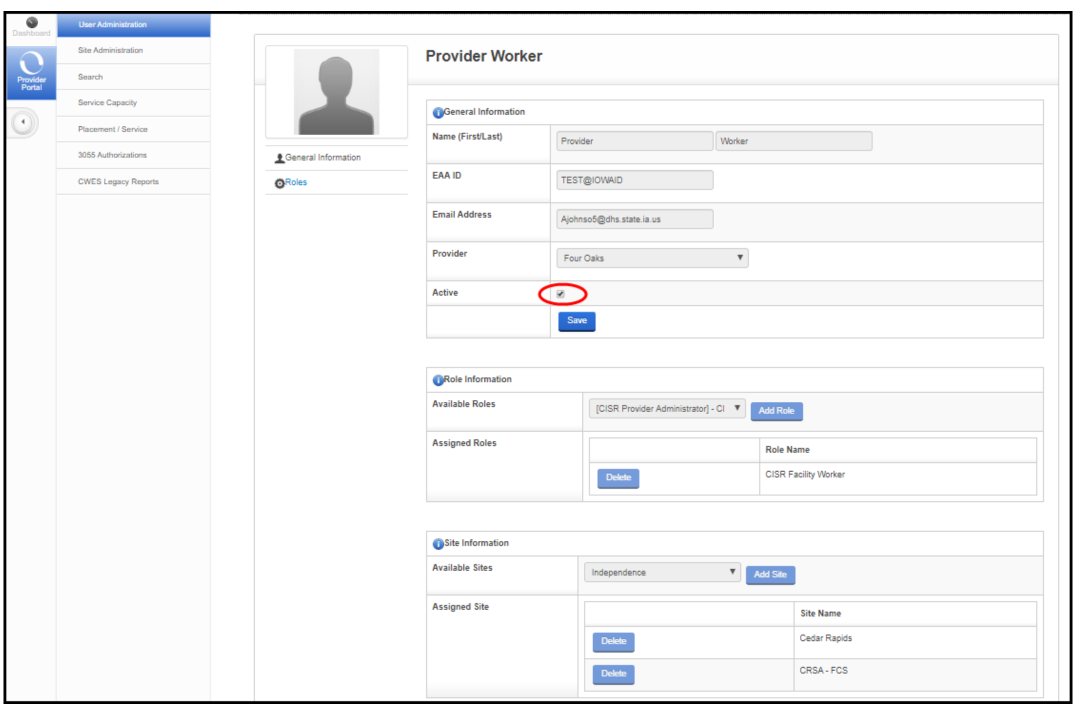
NOTE: The search function must be used to locate an inactive worker.

Once selected, their user profile will display. The account details are greyed out and not modifiable with the exception of the Active Check box. Contact the CWIS Help Desk if changes need to be made to the user’s account details.

Activate/De-Activate Provider Staff

- Activate - Check the “Active” box and click Save. This action will add the worker back to the active User List. Workers <u>must</u> log in the same day their account was activated otherwise their account will go inactive in the overnight batch.

- Deactivate - Uncheck the “Active” box on the worker’s profile and click Save. This action will deactivate the user and they will no longer display on the User List.

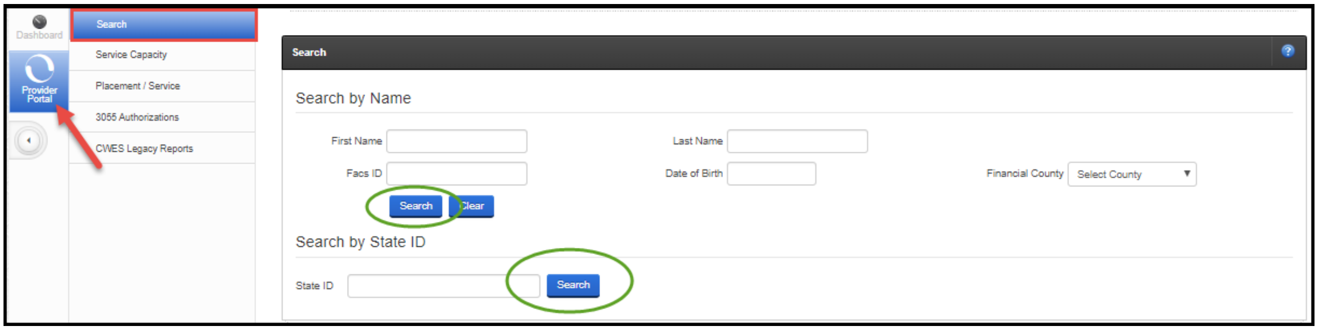


NOTE: Contact the CWIS Help Desk to add a <u>new user</u> who has not had prior access to the Provider Portal.

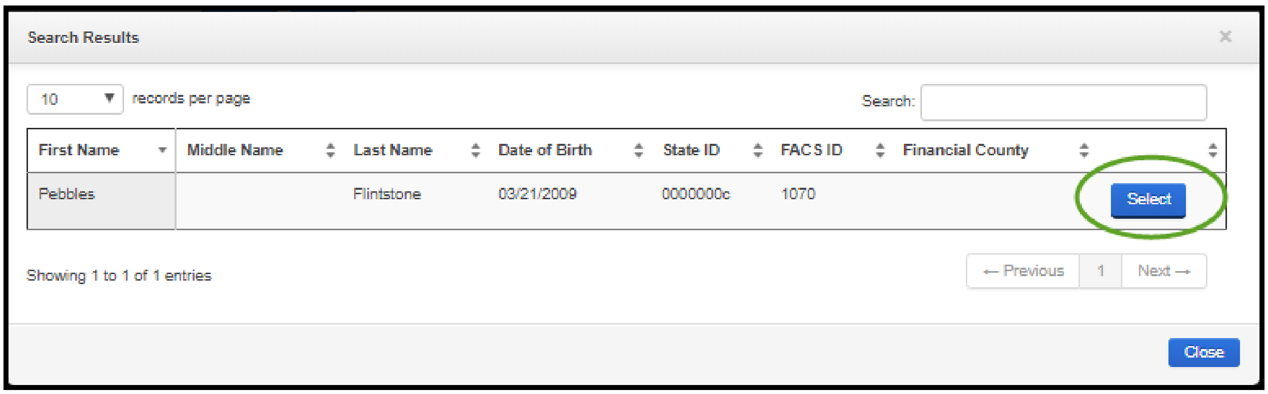
Search

Search for a child by using the Search tab.

1. Click on the "Search" tab.
2. Enter Name (and any known demographic information) or State ID in the search fields and click the "Search" button.

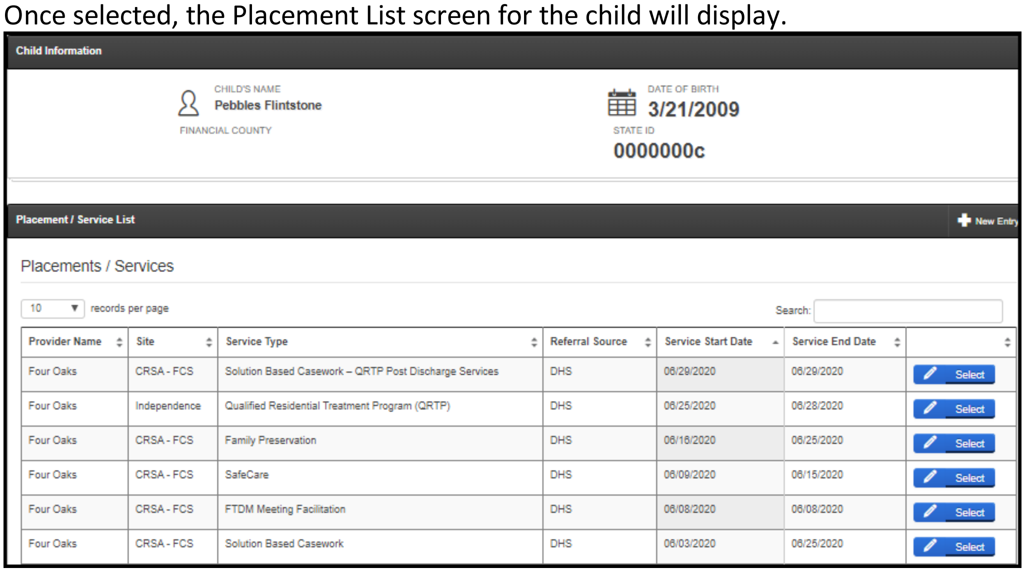


3. A pop-up window will display any search result matches. Click the "Select" button next to the appropriate child from the results list.



NOTE: If there is not a match for the child within the search results, provider staff should contact the HHS worker.

Once selected, the Placement List screen for the child will display.

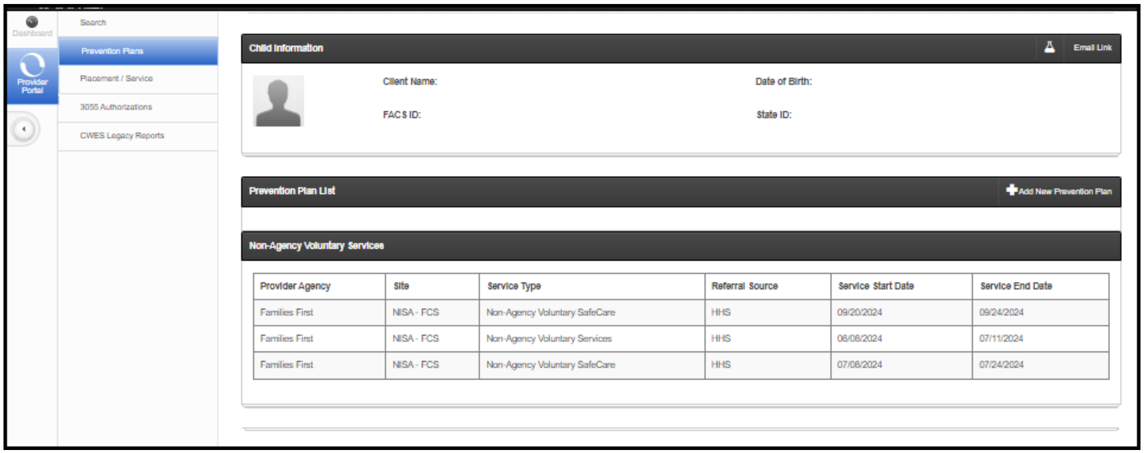


Note: The Placement/Service detail pop-up window will be read only for placements/services ended prior to 7/1/20.

Prevention Plan

The tab has two sections:

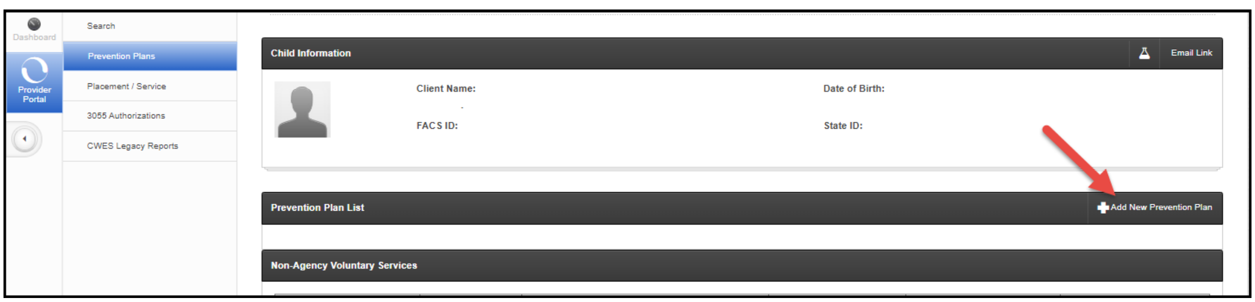
1. Prevention Plan List - displays a list of the Prevention Plans created by FCS provider staff within your agency.
2. Non-Agency Voluntary Services – automatically displays a list of both Non-Agency Voluntary Services and/or Non-Agency Voluntary SafeCare that have been entered by your agency on the Placement/Service screen.



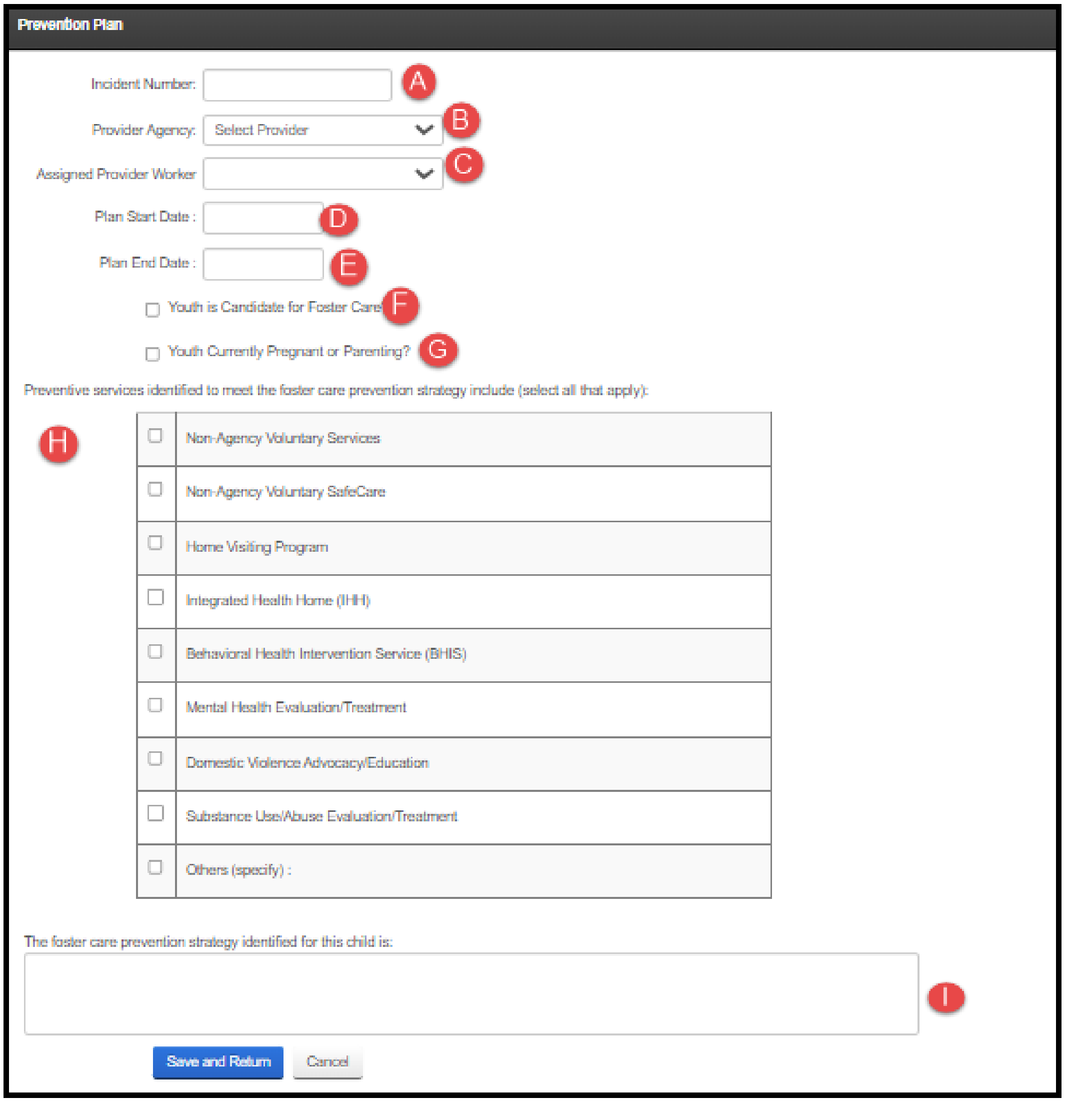
<u>Creating a Prevention Plan</u>

A Prevention Plan must be created <u>PRIOR</u> to entry of Non-Agency services on the Placement/Service tab otherwise a validation message will display (see page 3).

1. Click the "+Add New Prevention Plan" button on the header.

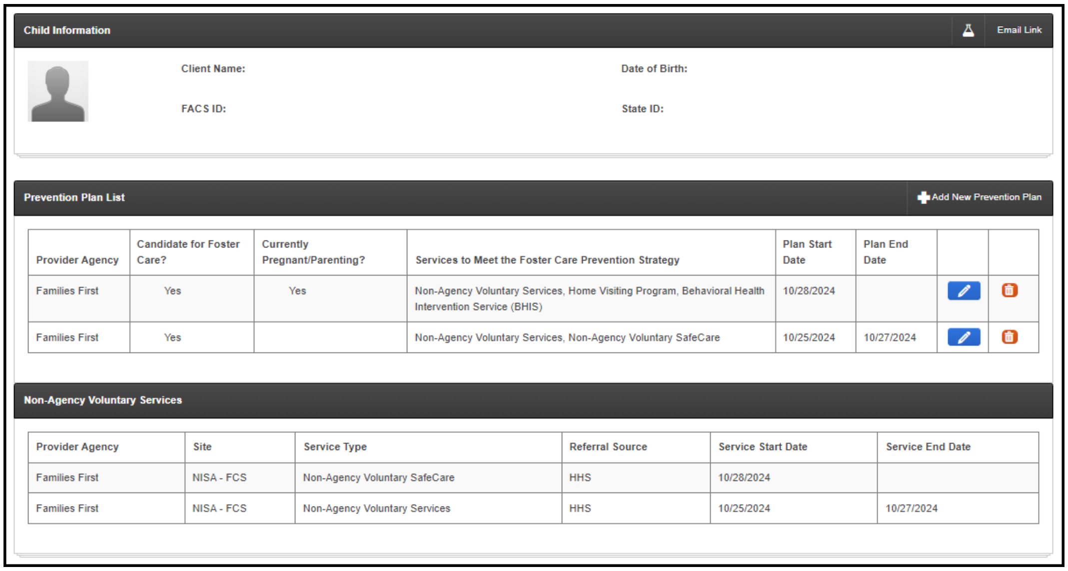


2. Enter details into the Prevention Plan:



A. Enter the Assessment Incident Number. The incident number must be a valid assessment with 10 numeric digits. The incident number cannot be re-used on another Prevention Plan for the same child. It may be reused on a sibling case.
B. Select the agency from the dropdown options.
C. Select the Provider Worker assigned for the specific service.
D. Enter the Plan start date. The system will not accept a future start date or allow the date to overlap with an existing Prevention Plan.
E. The end date <u>can</u> be left blank until the Prevention Plan is ready to be ended. A future end date cannot be used.
F. Check the box if the youth is a Candidate for Foster Care.
G. Check the box if the youth is pregnant or parenting.
H. Select all applicable preventative services identified to meet the foster care prevention strategy. At least one must be selected. If other is selected, then a free form text box will be available to document the other service.
I. Enter text in the free form text field to document the foster care prevention strategy identified.

3. Click "Save and Return" button.
4. The system will navigate to the Prevention Plan list which will display the list of Prevention Plans that have been created for this youth within your agency.



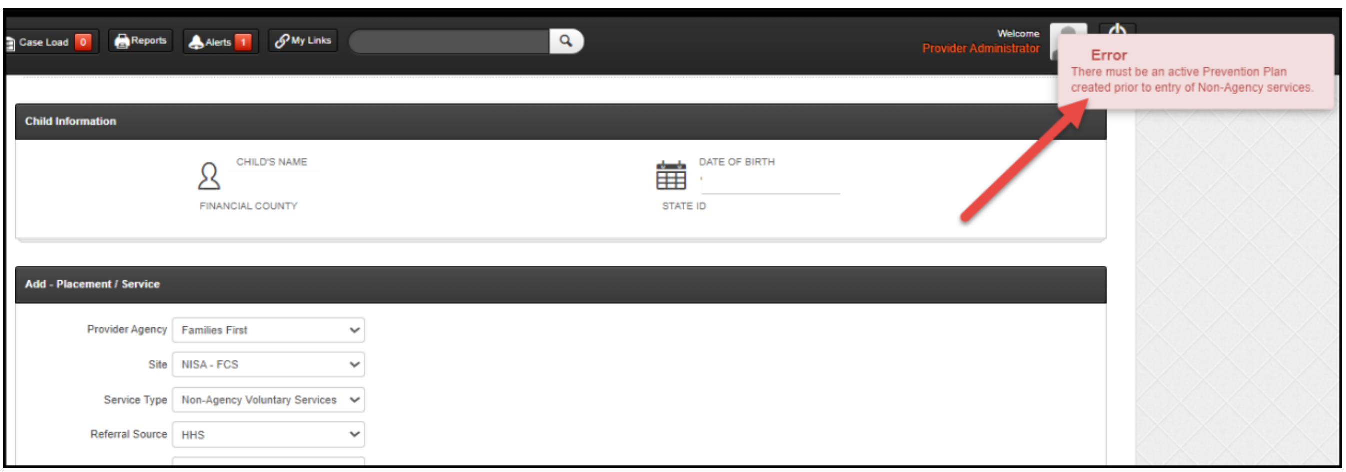
- ➢ Click the pencil icon to update the Prevention Plan as needed.
- ➢ Facility Administrators will have a red trash can icon available to delete any Prevention Plans created in error.

<u>Prevention Plan Must Cover the Span of Non-Agency Services</u>

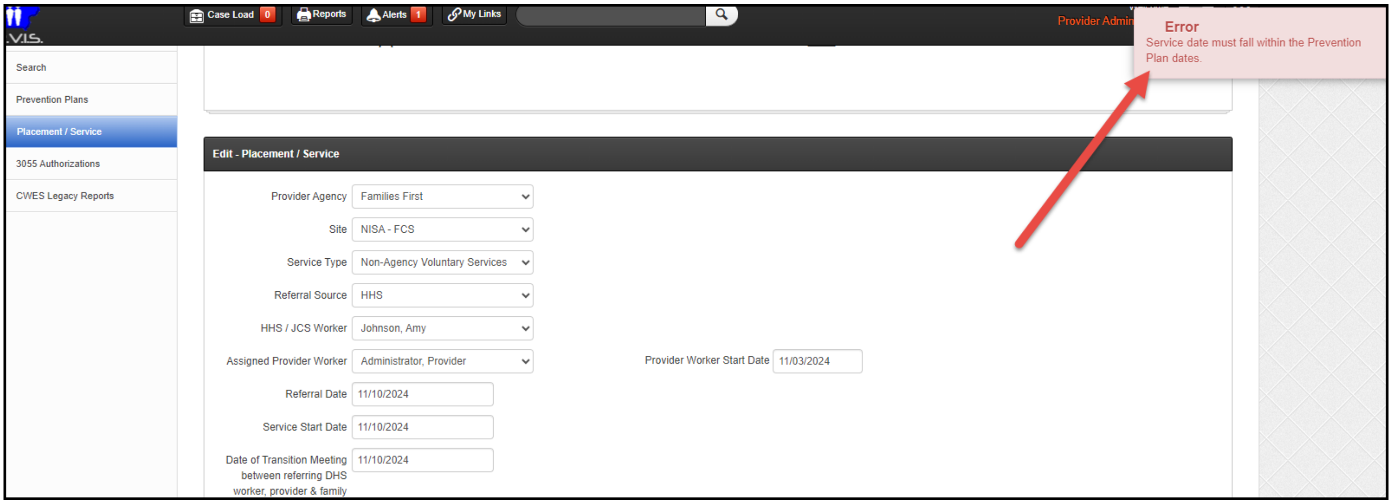
A Prevention Plan must be entered for any Non-Agency services with a start date of 11/21/24 or after. The Prevention Plan must cover the span of Non-Agency services. Validation messages have been added to ensure that requirement is met.

<u>Validations on the Service Detail Screen</u>:

1. If the user attempts to save the Non-Agency services on the Placement/Service tab without an active Prevention Plan, the following error will display.

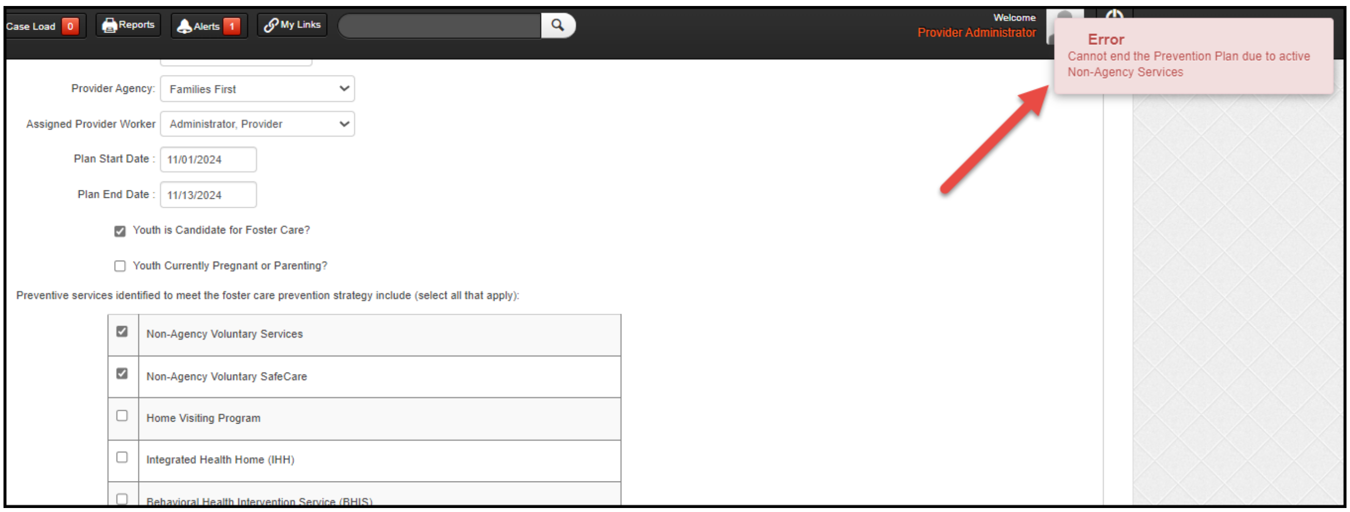


2. If the user attempts to enter a start or end date that falls outside of the Prevention Plan dates, the following error will display.

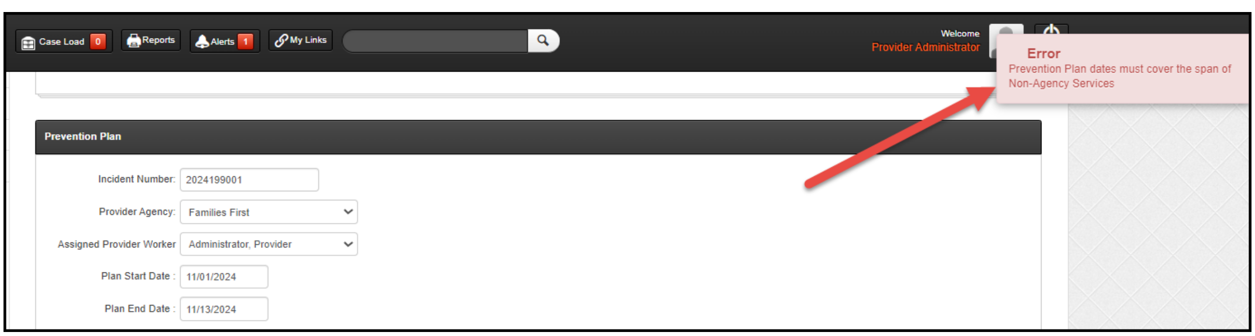


Prevention Plan Validations

1. When the user attempts to end a Prevention Plan but Non-Agency Services are still active, the following error message will display:

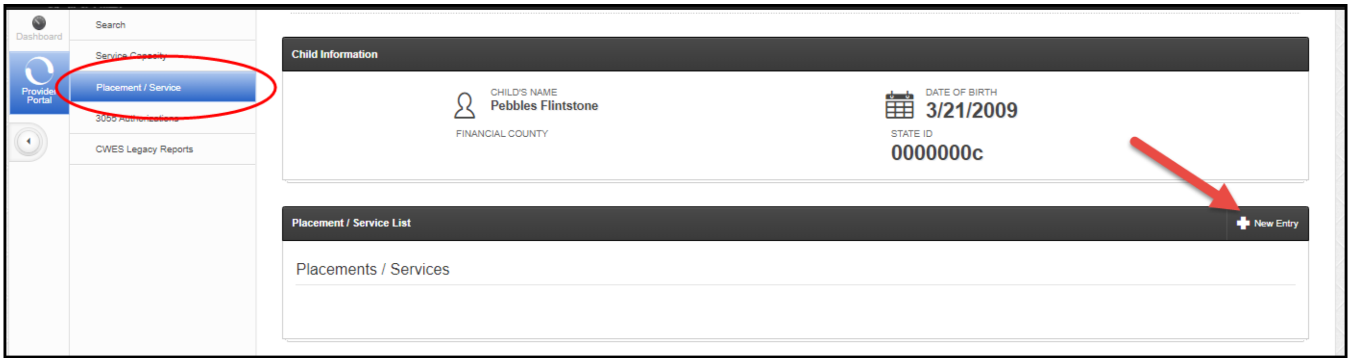


2. When the user attempts to end a Prevention Plan with a date that is prior to the Non-Agency Service end date, the following error message will display:

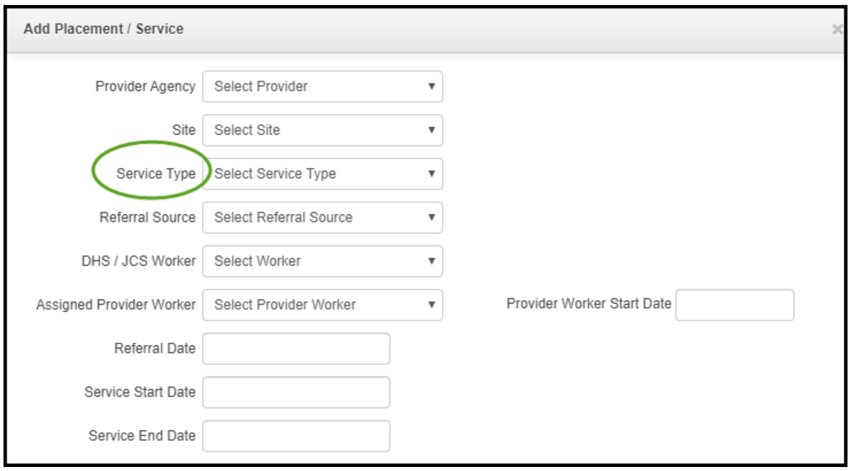


Add a Placement/Service

1. On the Placement/Service tab, click the "+ New Entry" button on the Placement/Service list header.



2. Complete the Placement/Service pop-up window with the appropriate information.

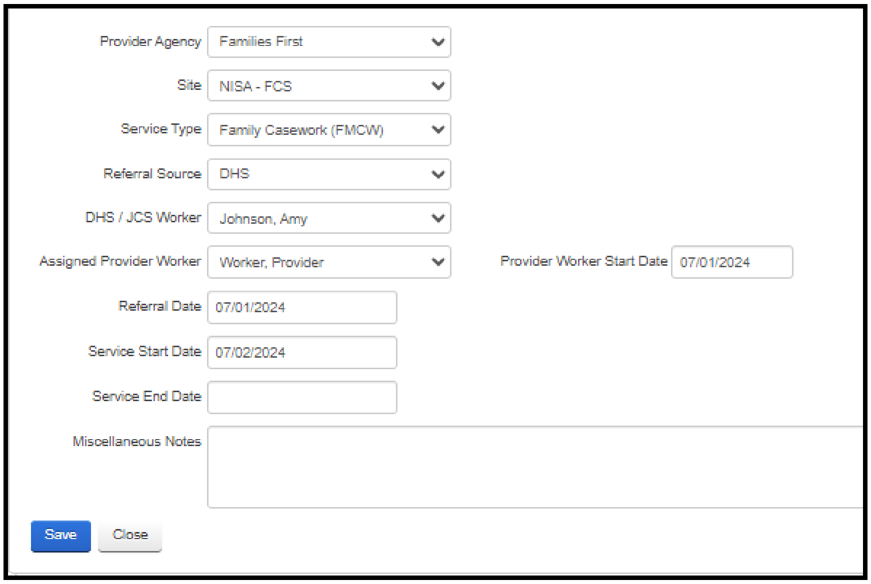


A standard set of fields will display for all service types. These include:

- **Provider Agency** - Select the applicable agency of the service or placement.
- **Site** - When adding a placement, select the specific location or foster family where the child is placed. When adding Family Centered Services or Non-Agency Voluntary Services, select the Service Area followed by FCS. Example: NISA - FCS.
- **Service Type** - Select the applicable service type.*
- **Referral Source** - Select DHS, JCS, Voluntary, or Law Enforcement.
- **DHS / JCS Worker** - Select the worker assigned.
- **Assigned Provider Worker** - Select the Provider Worker assigned for the specific service. This selection must be kept up to date in real time with the most current assigned worker.
- **Provider Worker Start Date** - Select the date the Provider Worker was assigned to the specific service. This selection must be kept up to date in real time, changed with each Assigned Provider Worker update.
- **Referral Date** - Select the date the service was referred to the agency.
- **Service Start Date** - Select the date the placement or service began.
- **Service End Date** - Select the date the placement or service ended. This may be left blank until the service or placement closes.
- **Miscellaneous Notes** - Free form text field to enter information as needed.

Note: The Service Type selected determines which additional fields display for entry. See list below for fields dynamic to each Service Type.

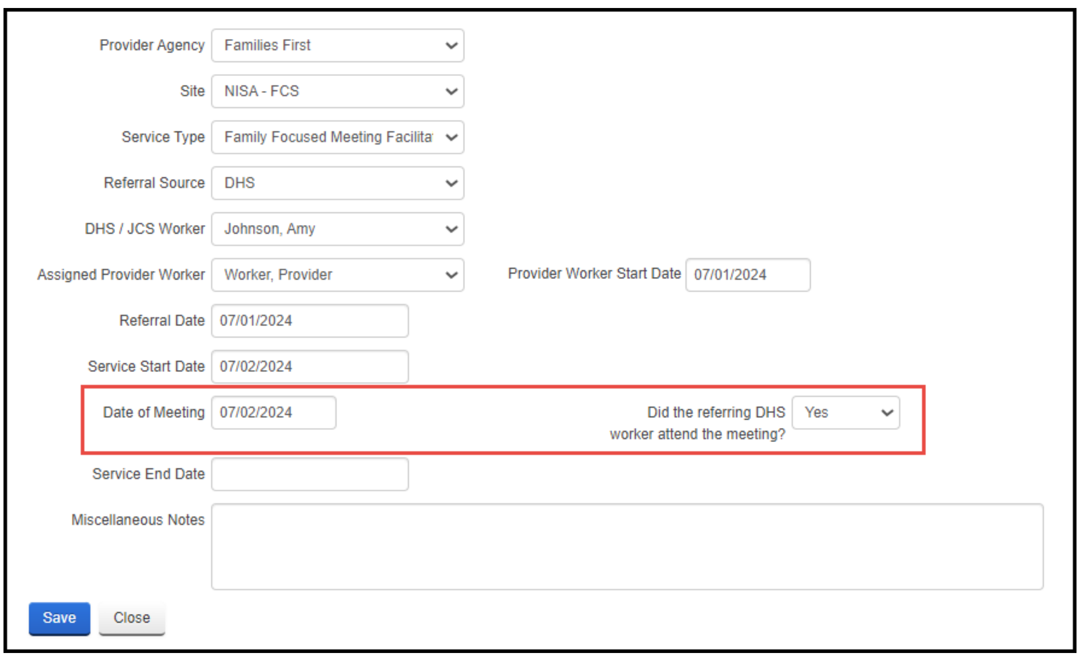
Family Casework


Provider Agency Families First
Site NISA - FCS
Service Type Family Casework (FMCW)
Referral Source DHS
DHS / JCS Worker Johnson, Amy
Assigned Provider Worker Worker, Provider
Provider Worker Start Date 07/01/2024
Referral Date 07/01/2024
Service Start Date 07/02/2024
Service End Date
Miscellaneous Notes
Save Close

Family Focused Meeting Facilitation

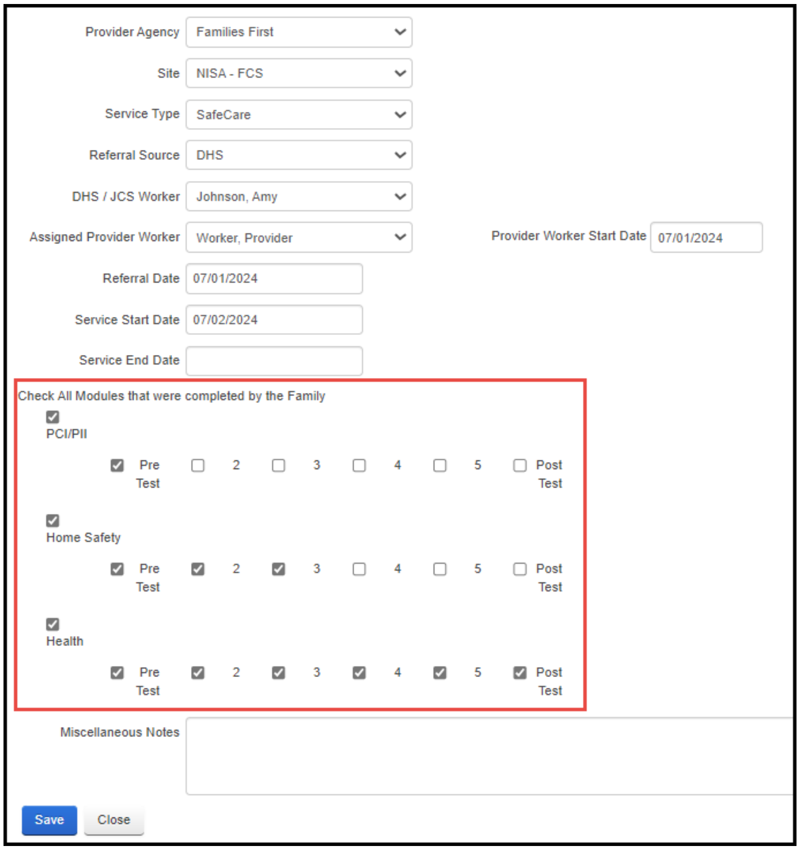
Additional fields that automatically display when either FFM or YTDM meeting is the selected Service Type include:

- Date of Meeting – this field can be left blank if the meeting did not occur.
- Did the referring HHS worker attend the meeting? – this field can be left blank if the meeting did not occur.


Provider Agency Families First
Site NISA - FCS
Service Type Family Focused Meeting Facilita
Referral Source DHS
DHS / JCS Worker Johnson, Amy
Assigned Provider Worker Worker, Provider
Provider Worker Start Date 07/01/2024
Referral Date 07/01/2024
Service Start Date 07/02/2024
Date of Meeting 07/02/2024
Did the referring DHS worker attend the meeting? Yes
Service End Date
Miscellaneous Notes
Save Close

SafeCare

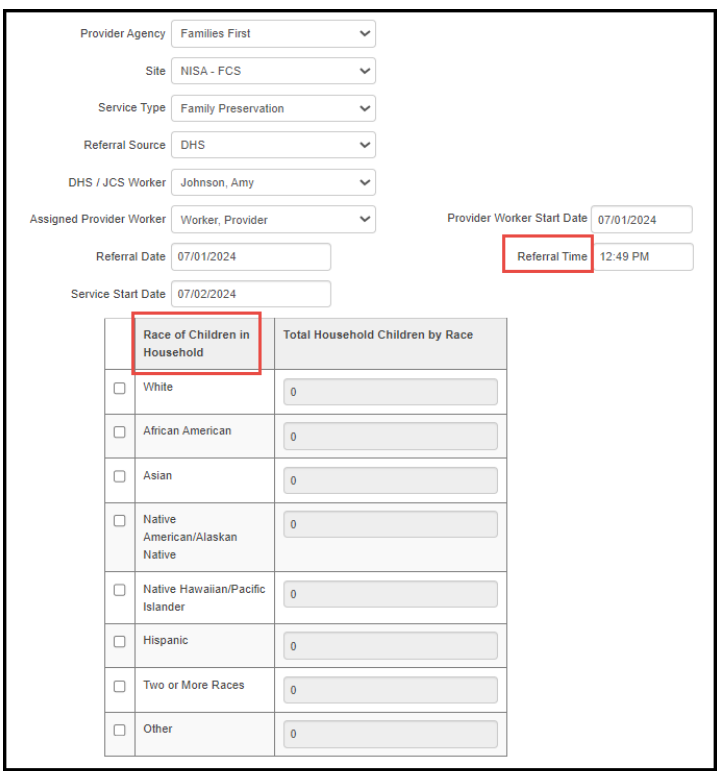
Modules including PCI/PII, Home Safety, and Health are available for selection. Check all modules and sessions completed by the family.



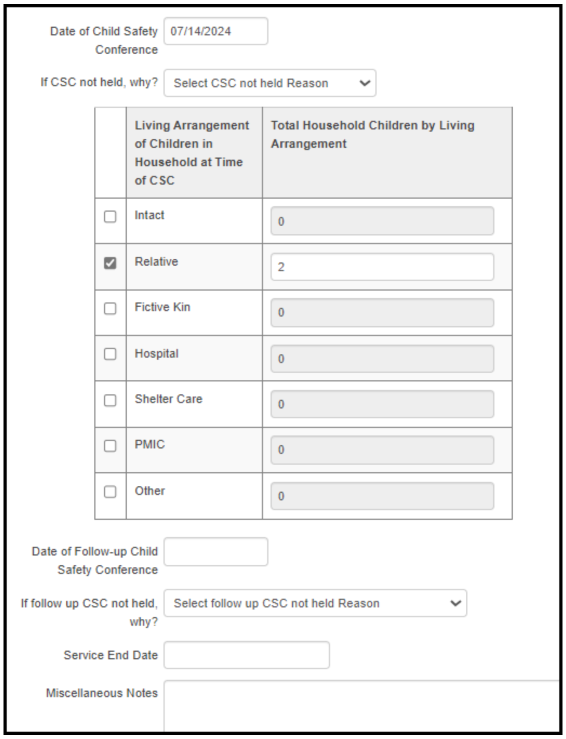
Family Preservation

Additional fields that automatically display when Family Preservation is the selected Service Type include:

- Referral Time
- Race of Children in the Household – Check a box next to the appropriate race and enter a numeric value for the total number of household children for the selected race. Users can select more than one option.



- Date of Child Safety Conference
- If a CSC was not held, select a reason from the drop-down menu.
- Living Arrangement of Children in the Household at Time of CSC - Check a box next to the appropriate household arrangement and enter a numeric value for the total number of household children in the selected living arrangement. Users can select more than one option.
- Date of Follow-up Child Safety Conference
- If a Follow-up CSC was not held, select a reason from the drop-down menu.



Date of Child Safety Conference: 07/14/2024

If CSC not held, why? Select CSC not held Reason

	Living Arrangement of Children in Household at Time of CSC	Total Household Children by Living Arrangement
☐	Intact	0
☑	Relative	2
☐	Fictive Kin	0
☐	Hospital	0
☐	Shelter Care	0
☐	PMIC	0
☐	Other	0

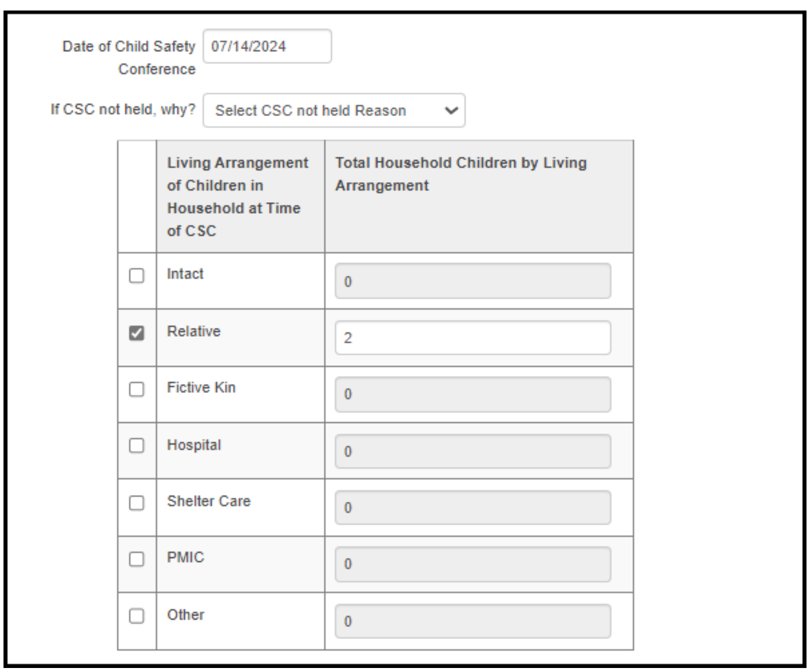
Date of Follow-up Child Safety Conference

If follow up CSC not held, why? Select follow up CSC not held Reason

Service End Date

Miscellaneous Notes

- When the date of follow-up Child Safety Conference is entered, a section displays to enter the Living Arrangement of Children in the Household at Time of Follow-up CSC - Check a box next to the appropriate household arrangement and enter a numeric value for the total number of household children in the selected living arrangement. Users can select more than one option.



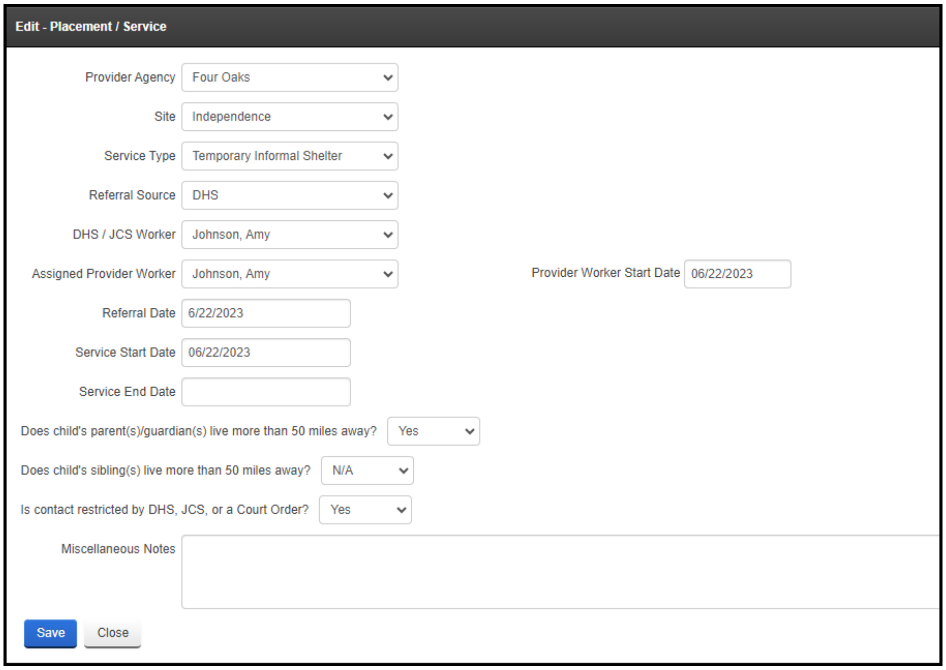
Date of Child Safety Conference: 07/14/2024

If CSC not held, why? Select CSC not held Reason

	Living Arrangement of Children in Household at Time of CSC	Total Household Children by Living Arrangement
☐	Intact	0
☑	Relative	2
☐	Fictive Kin	0
☐	Hospital	0
☐	Shelter Care	0
☐	PMIC	0
☐	Other	0

Temporary Inforaal Shelter

This service should only be entered in the Provider Portal if there is/will be an open service case.

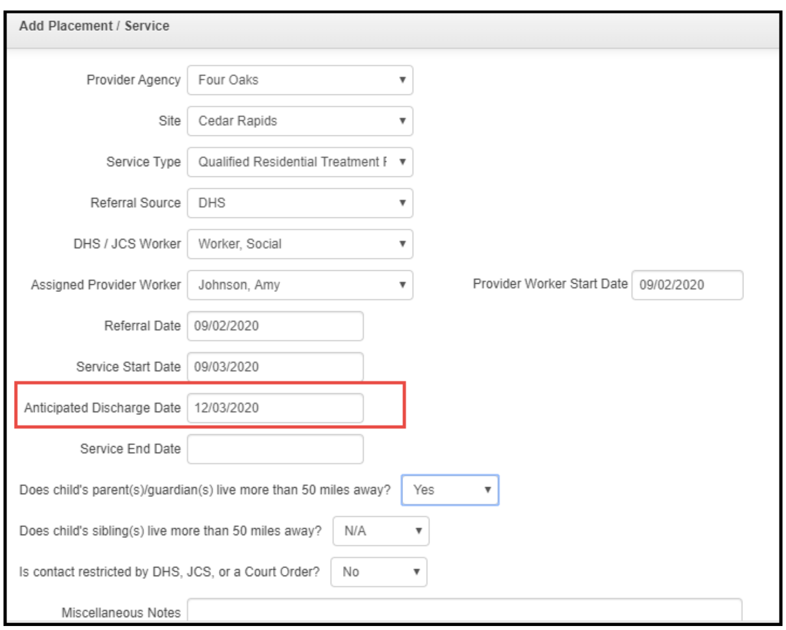


Qualified Residential Treatment Program (QRTP)

Additional fields that automatically display when Qualified Residential Treatment Program (QRTP) is the selected Service Type include:

- Anticipated Discharge Date
- QRTP Post-Discharge Service Provider - This field will only display when the Service End date is entered. If QRTP Post-Discharge Services is not to be provided, an additional field displays to indicate the reason why.
- Does the child's parent(s)/guardian(s) live more than 50 miles away? *
- Does the child's sibling(s) live more than 50 miles away? *
- Is contact restricted by DHS, JCS, or a Court Order? *

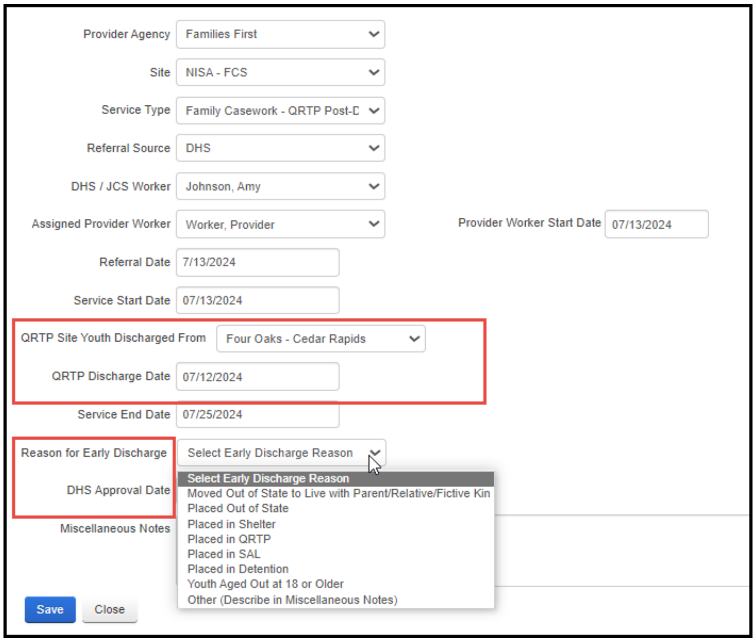
* NOTE: These 3 fields display on <u>all</u> placement types including Foster Family, Temporary Informal Shelter, Scattered Site, Clustered Site, and QRTP.



Family Casework - QRTP Post-Discharge Services

Additional fields that automatically display when Family Casework – QRTP Post-Discharge Services is the selected Service Type include:

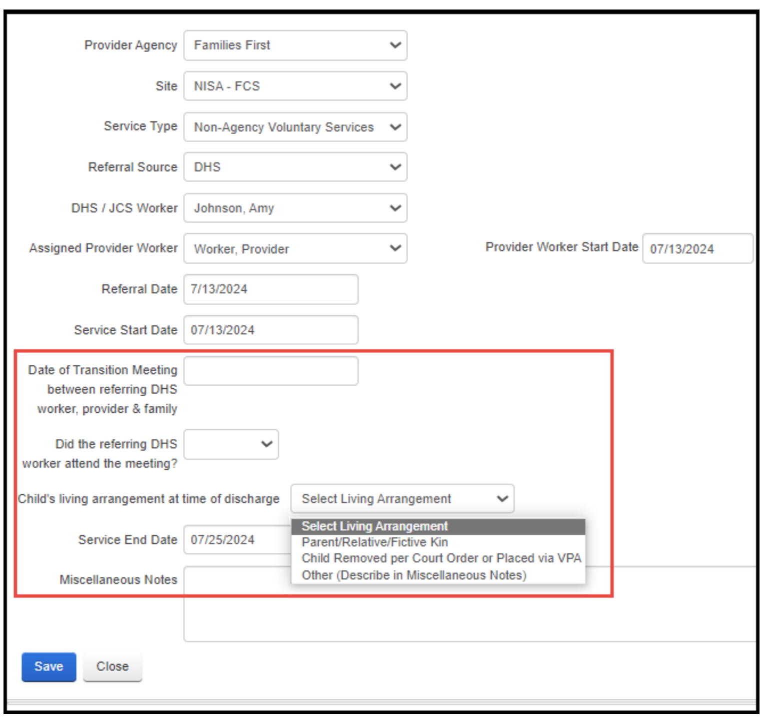
- QRTP Site the youth was discharged from and the QRTP Discharge Date.
- If the service is ended in less than 180 calendar days after the youth's discharge from QRTP, DHS Approval Date and Reason for Early Discharge fields will display.



Non-Agency Voluntary Services

Additional fields that automatically display when Non-Agency Voluntary Services is the selected Service Type include:

- Date of Transition meeting between referring DHS worker, provider, and family?
- Did the referring DHS worker attend the meeting?
- Child's living arrangement at time of discharge.

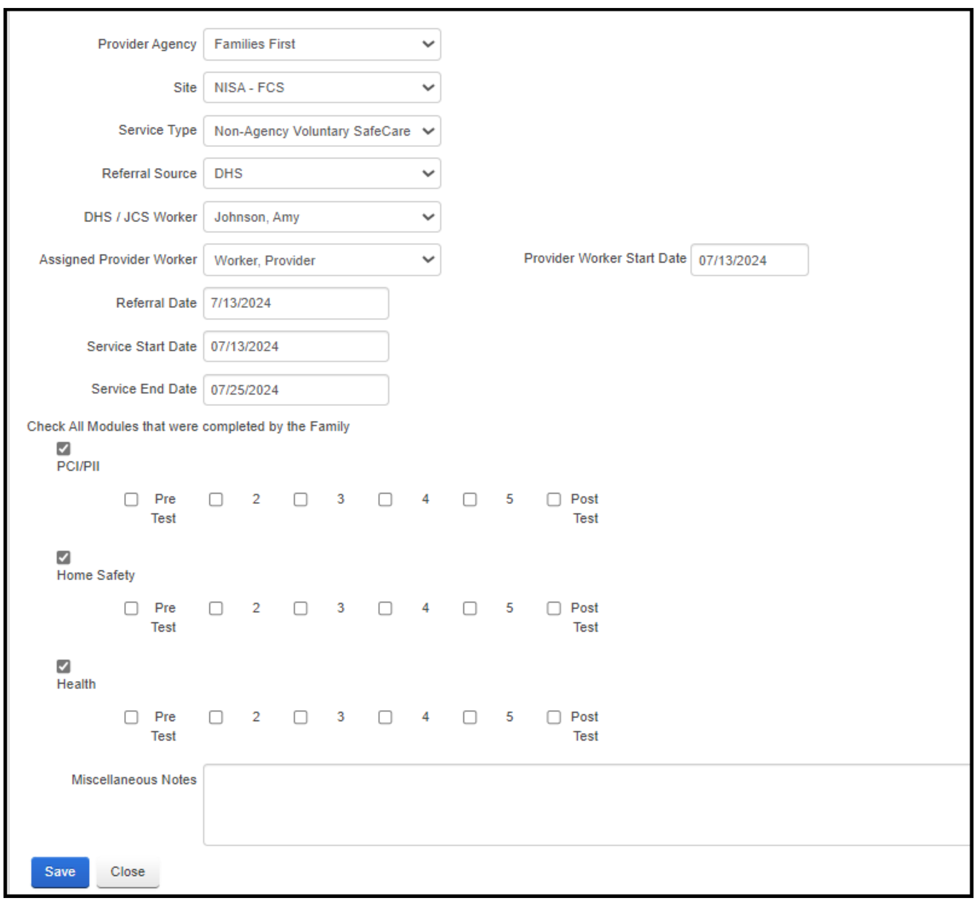


If a Transition Meeting did not occur, follow the steps below:

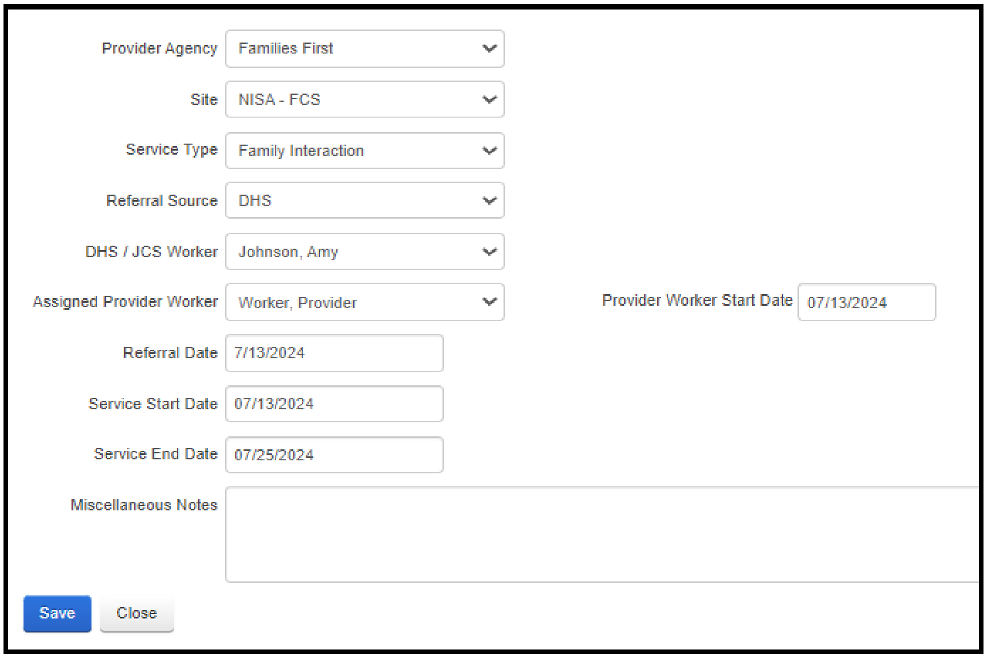
1. Leave the Date of Transition Meeting field (1) blank.
2. On the question "Did the referring DHS worker attend the meeting?" (2), select "Meeting Not Held" from the drop-down menu.
3. Details regarding why the Transition Meeting did not occur should be documented in the Miscellaneous Notes section (3).

Non-Agency Voluntary SafeCare

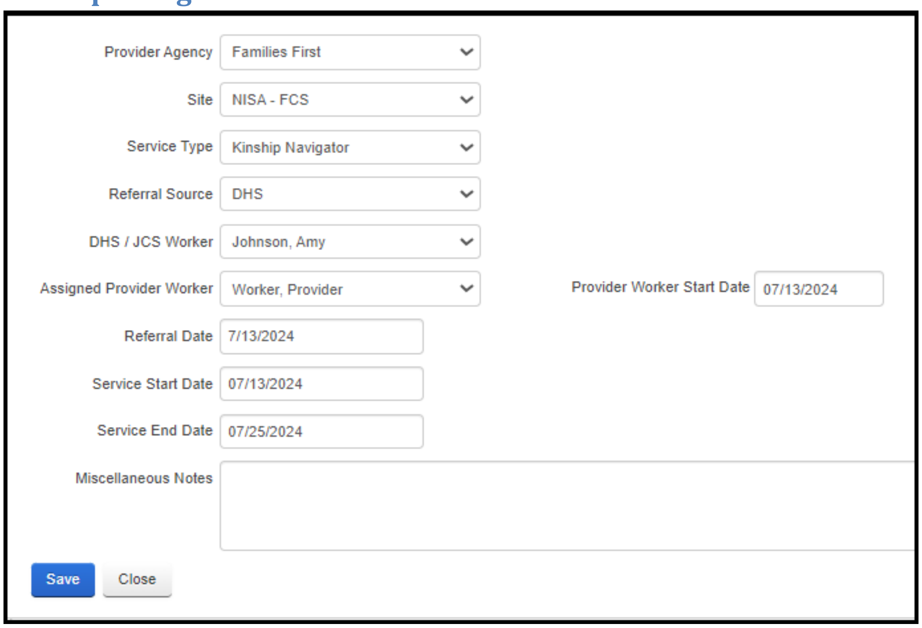
Modules including PCI/PII, Home Safety, and Health are available for selection. Check all modules and sessions completed by the family.



Family Interaction



Kinship Navigator



Kinship Navigator services can overlap in the portal.

Placement/Service Overlap

A validation error will display when a placement or service entry conflicts with an existing overlapping record on the Placement/Service List. See system guidelines below to determine which types of placements and services cannot overlap on the Placement/Service list.

- Non-Agency Voluntary Services and Non-Agency Voluntary SafeCare should not overlap any other service or placement type.
- Placements should not overlap any other placements with the exception of Temporary Informal Shelter. Temporary Informal shelter can only overlap with Foster Care and Family Centered Services.

NOTE: Family Casework should not overlap a QRTP or Shelter placement for more than 30 calendar days unless there is HHS approval.

A conflicting placement/service may not be visible since each user is only able to see placements and services entered by their own agency. The error message will specify the Provider, Site, and Service Type of the conflicting placement so contact can be made to reconcile entries. An example of an error message is below:

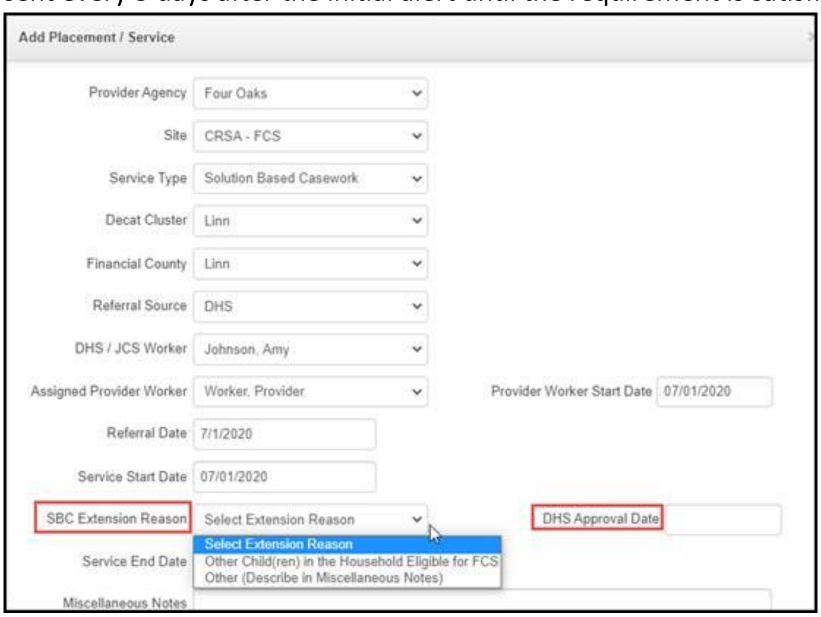
> **Error**
> Child is currently placed in Lutheran Services In Iowa, Waverly (Qualified Residential Treatment Program (QRTP)). Please contact them to end the current service.

Alert

Family Casework and Family Casework - QRTP Post-Discharge Services should not overlap with a QRTP or Shelter placement for more than 30 days. If services continue beyond that point, the FMCW provider will be required to enter a DHS Approval Date and FMCW Exception Reason in the Provider Portal. An alert and email notification will be sent to the SWCM, SWCM Supervisor, and Assigned FMCW Provider Worker to notify them when an overlap has occurred for 23 days. The email notification will be sent to all three recipients on the same email so that a determination can be made regarding the date of service closure prior to the 30 day mark.

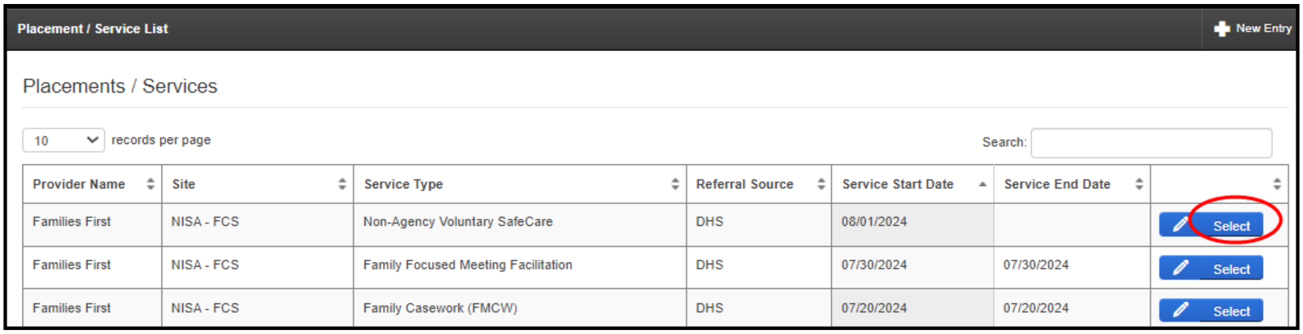
> Subject: Provider Portal - Service Overlap for FACS ID# 98 :- Daffy Duck
>
> Family Casework :service overlaps Qualified Residential Treatment Program (QRTP) placement for FACS ID # 9! /State ID # NA - Daffy Duck. Contact Four Oaks provider to end the service or provide extension reason.

In order to satisfy the alert, the FMCW provider will need to end services in the Provider Portal <u>or</u> enter a DHS Approval Date and select the FMCW Exception Reason for continued service. The notification will be sent every 3 days after the initial alert until the requirement is satisfied.



Select a Placement/Service

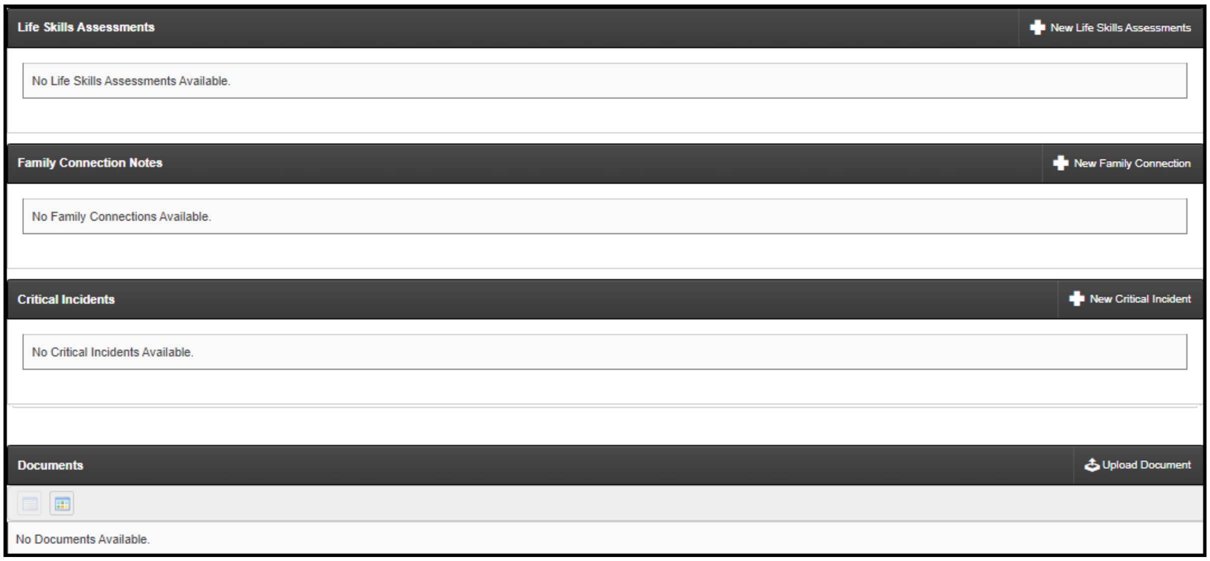
Click “Select” next to the placement entry to access Life Skills Assessments, Family Connection Notes, Critical Incidents, and Documents.



Provider Name	Site	Service Type	Referral Source	Service Start Date	Service End Date	
Families First	NISA - FCS	Non-Agency Voluntary SafeCare	DHS	08/01/2024		Select
Families First	NISA - FCS	Family Focused Meeting Facilitation	DHS	07/30/2024	07/30/2024	Select
Families First	NISA - FCS	Family Casework (FMCW)	DHS	07/20/2024	07/20/2024	Select

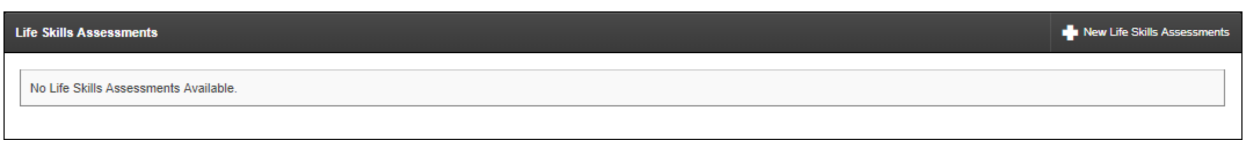
Once selected, the system will navigate to a screen where the user can view, modify, or add entries into each section.

NOTE: Family Connection Notes and Critical Incidents sections only display on Placement records.

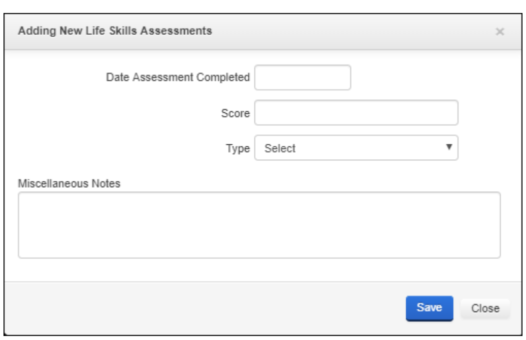


Life Skills Assessments

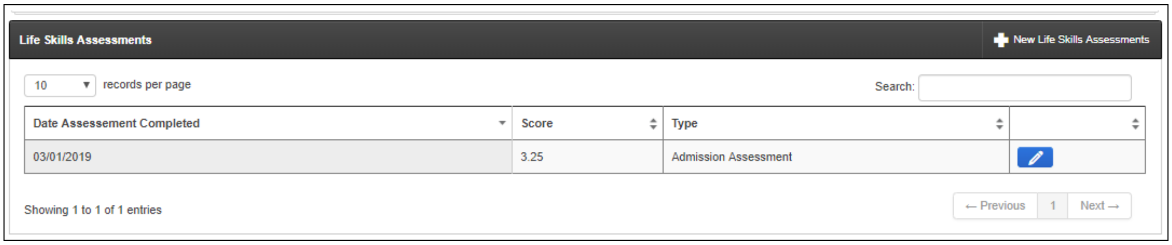
1. Click on the “+New Life Skills Assessments” button on the Life Skills Assessments header.



2. A pop-up window will display to enter the Date of Life Skills Assessment, the score, and the type of Assessment, along with a space for any Miscellaneous Notes.



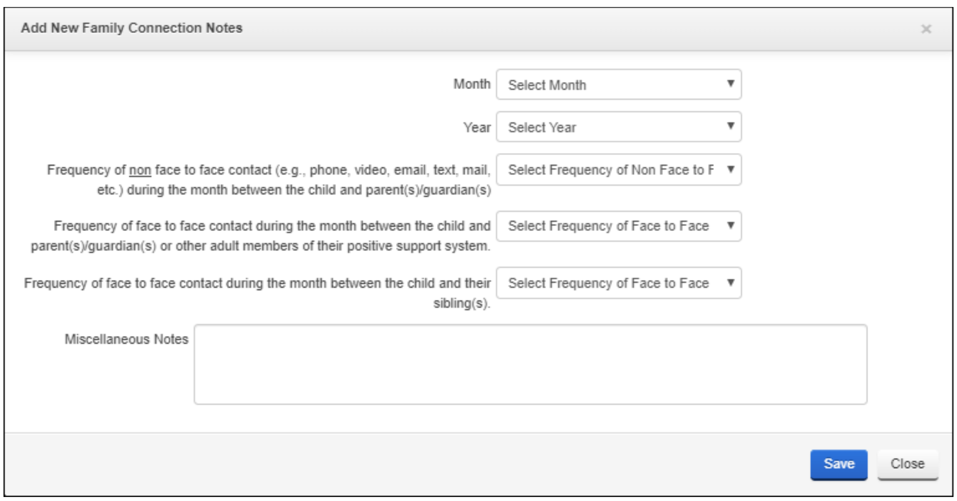
3. When entries are complete, hit “Save”. Once saved, the entry will display on the Life Skills Assessments list with the Date, Score, and Type. Click on the blue paper and pencil icon next to the entry on the Family Connection Notes list to view and/or modify the note detail.



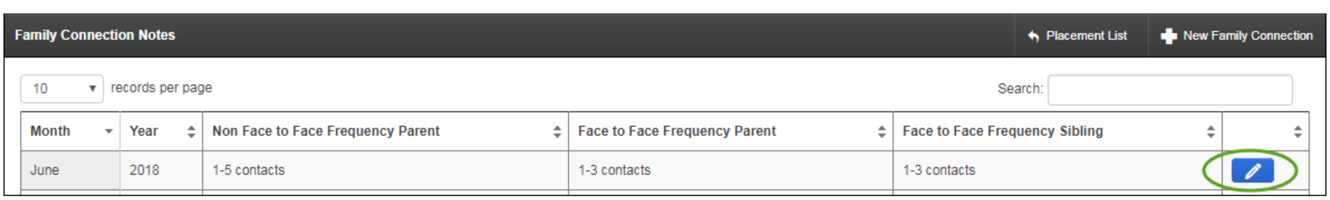
Family Connection Notes

1. Click on the “+ New Family Connection” button on the Family Connection Notes header.

2. A pop-up window will display to enter details regarding a month of Family Connections. All drop-downs require a selection to be made and a Miscellaneous Notes section is available. When complete, hit “Save.”



3. Once saved, the entry will display on the Family Connection Notes list with the date and type of each contact. Click on the blue paper and pencil icon next to the entry on the Family Connection Notes list to view and/or modify the note detail.



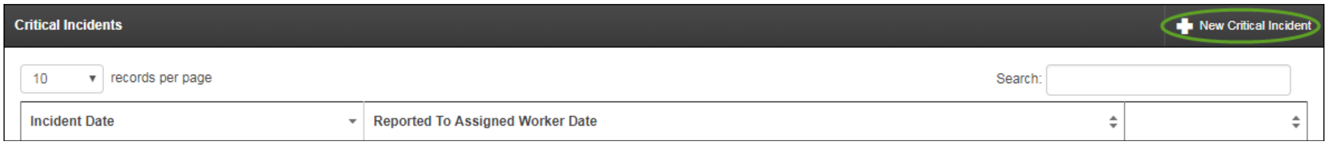
Critical Incidents

Placement providers will utilize the Provider Portal to document all critical incidents within 24 hours of occurrence. Any circumstances listed below require a Critical Incident to be documented:

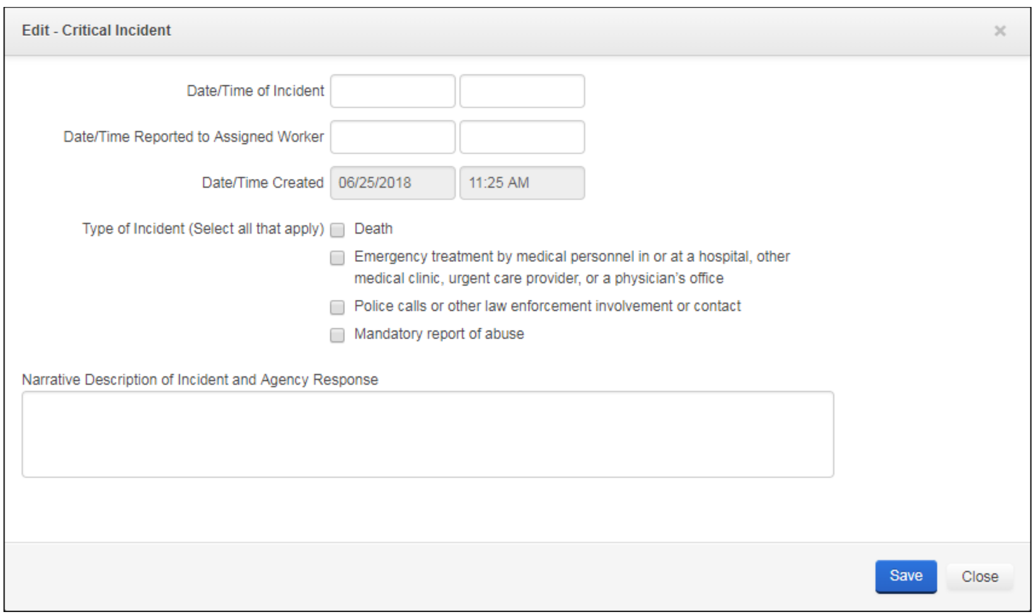
– Death

- Emergency treatment by medical personnel in or at a hospital, other medical clinic, urgent care provider, or a physician's office
- Police calls or other law enforcement involvement or contact
- Mandatory report of abuse

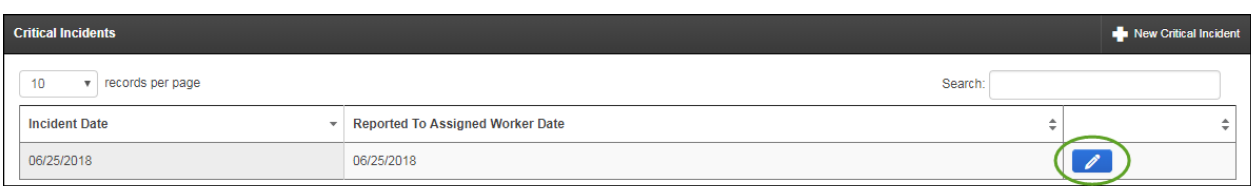
1. Click on the "+ New Critical Incident" button on the Critical Incidents header.



2. A pop-up window will display to enter details regarding the Critical Incident.
   - Enter the Date/Time of Incident and when it was reported to the assigned worker.
   - The Date/Time Created will automatically populate based on when the incident documentation began.
   - Select all applicable type(s) of incidents from the available options.
   - Thoroughly document the incident in the Narrative Description of Incident and Agency Response field.
   - Once completed, hit "Save."



3. The entry will display on the Critical Incident list with Incident Date and the Reported to Assigned Worker Date.



4. Click on the blue paper and pencil icon next to the entry on the Critical Incident list to view and/or modify the detail.

Critical Incident Notification

The assigned HHS or JCS worker will automatically receive an email notification from JARVIS if a critical incident has been entered for a child on their caseload. This does not replace the need for immediate telephonic notification for certain types of critical incidents:

> *CISR contractors must still notify the child's parent(s) or guardian and referral worker immediately of any serious illness, incident involving serious bodily injury, or circumstances causing removal of the child from the facility. In the event of the death of a child, a contractor shall immediately notify the child's parent(s) or guardian, the referral worker, the appropriate state authority, and the physician (if applicable). This information must be communicated in such a manner that the receipt of the information is assured; i.e., acknowledgement back from these parties is required. It is recommended that this information be communicated by telephone or in person, not via email or otherwise leaving a message.*

Documents

Under Documents, providers can upload PDF, TIFF, or JPEG/JPG documents specific to the placement or service selected. Many of the document types that would have previously been mailed or emailed to the HHS worker will now be uploaded as a PDF to the Documents section in the Provider Portal. NOTE: Documents uploaded through the Provider Portal are only available to HHS staff. Although JCS staff do not have access to Documents in the Provider Portal, placement providers are still required to upload CWES/Shelter Care, QRTP, and Supervised Apartment Living reports and documents to the Provider Portal for JCS assigned cases.

1. Within a placement or service, click the "Upload Document" button on the right side of the Document header. An "Upload Document" box will pop up.

2. Enter a Display Name. To ensure documents are named in a uniform manner, utilize the following guide for entry of Display Name and the selection on Document Type dropdown.

QRTP	**Display Name**	**Document Type Selection**
	Service Plan <date>	Service Plan/Family Agreement
	Case Progress Report <date>	Service Progress Summary
	Discharge Summary <date>	Service Discharge/Termination Summary

Shelter Care	**Display Name**	**Document Type Selection**
	Service Plan <date>	Service Plan/Family Agreement
	Discharge Summary <date>	Service Discharge/Termination Summary

Temporary	**Display Name**	**Document Type Selection**
Informal Shelter	CWES Intake Form <date>	CWES Intake Form

SAL	**Display Name**	**Document Type Selection**
	Service Plan <date>	Service Plan/Family Agreement
	SAL Budget Plan <date>	SAL Budget Plan
	Case Progress Report <date>	Service Progress Summary
	Discharge Summary <date>	Service Discharge/Termination Summary
	Discovering Connections <date>	Discovering Connections

Kinship Navigator Services	Display Name	Document Type Selection
	Eco Map <date>	Genogram/EcoMap
	Kinship Care Plan <date>	Service Plan/Family Agreement
	Casework Contact Note <date>	Casework Contact Note
	Termination Summary <date>	Service Discharge/Termination Summary
	Kinship Nabigator Summary <date>	Kinship Navigator Summary

Family Preservation Services	Display Name	Document Type Selection
	Casework Contact Note <date>	Casework Contact Note
	Child Safety Conference Plan <date>	CSC/SFM/YTDM/SPC Notes or Plan
	STDM/YTDM Meeting Notes <date>	CSC/SFM/YTDM/SPC Notes or Plan
	YTDM Dream Path <date>	CSC/SFM/YTDM/SPC Notes or Plan
	Service Summary Report <date>	Service Discharge/Termination Summary

Family Casework FMCW QRTP Post-Discharge Services	Display Name	Document Type Selection
	Service Plan <date>	Service Plan
	Case Progress Report <date>	Service Progress Summary
	Service Termination Summary <date>	Service Discharge/Termination Summary
	FFM/YTDM Meeting Notes <date>	CSC/FFM/YTDM/SPC Notes or Plan
	YTDM Dream Path <date>	CSC/FFM/YTDM/SPC Notes or Plan
	Action Plan <date>	Action Plan
	Eco Map <date>	Genogram/EcoMap/Social Network Map

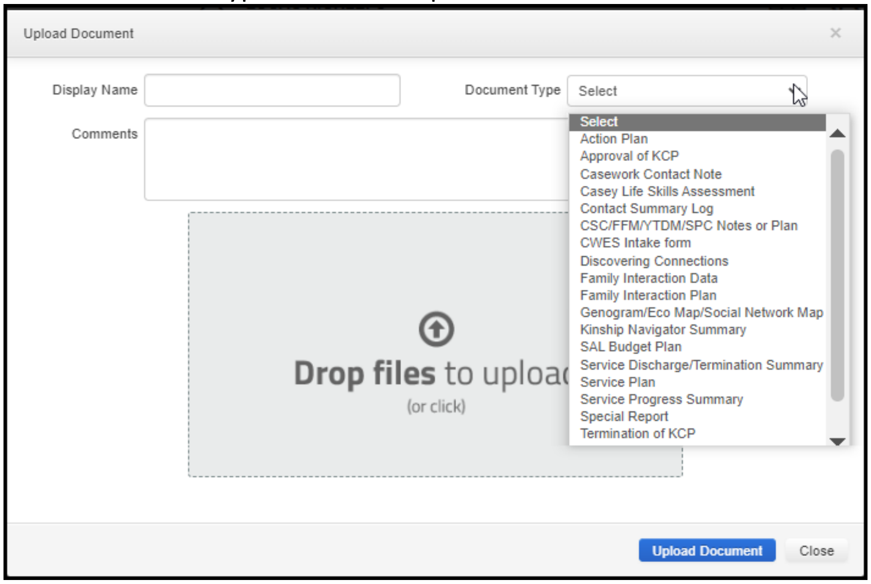
* Denotes requirement for both Agency service cases and Non-Agency Voluntary Service cases

SafeCare	Display Name	Document Type Selection
	Casework Contact Note <date>	Casework Contact Note
	Service Termination Summary <date>	Service Discharge/Termination Summary

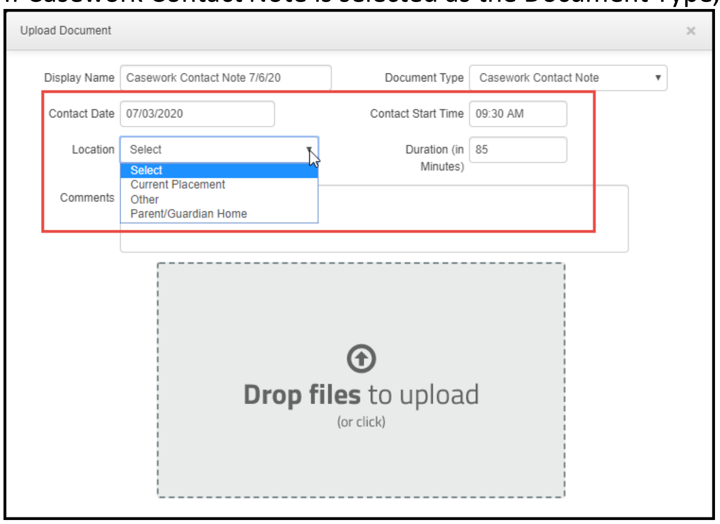
Family Interaction	Display Name	Document Type Selection
	Family Interaction Data <date>	Family Interaction Data
	Family Interaction Plan <date>	Family Interaction Plan

Common to Multiple Services	Display Name	Document Type Selection
	Casey Life Skills Assessment <date>	Casey Life Skills Assessment
	Special Report <date>	Special Report

3. Select Document Type from the drop-down menu.

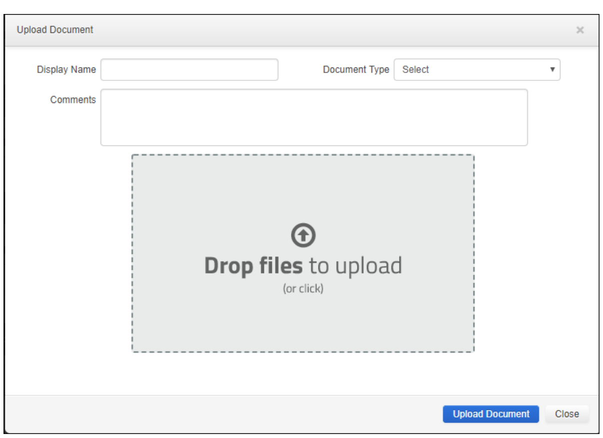


4. If Casework Contact Note is selected as the Document Type, then additional fields will display for entry.

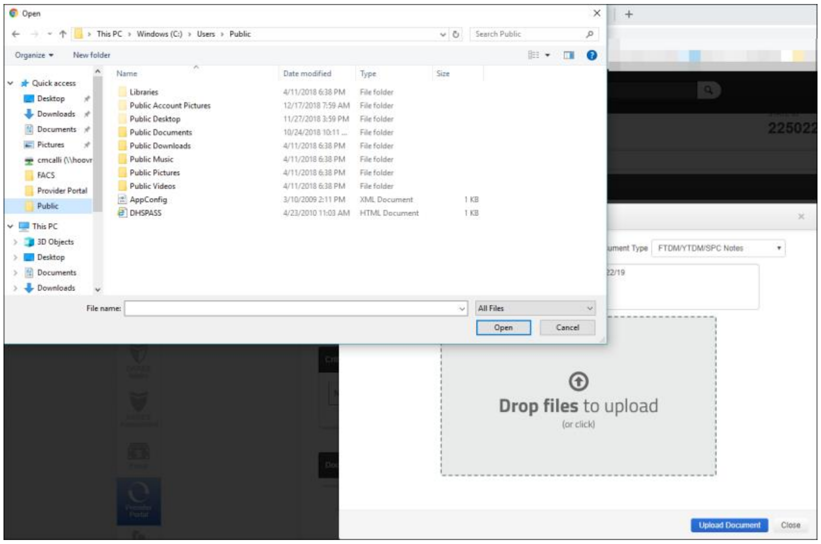


Note: The Contact Start Time field will only display when a Casework Contact Note is uploaded to a Family Preservation service.

5. Upload the file. There are two ways to upload files.
   - Drag the files to the “Drop files to upload” section (shown below). After completing the Display Name a Document Type, add applicable Comments as needed, and click the “Upload Document” button.



➢ Add files from a saved location by clicking the “Drop files to upload” text in the grey box. A pop-up window will display locations on your computer to locate the file you wish to upload. To select a file, double click or highlight and click “Open”. Once the file has populated to the upload area, complete the Display Name, select a Document Type, add applicable Comments as needed, and click the “Upload Document” button.



Uploaded files will display under the Documents grid.

Documents — Upload Document

Name	Document Type	Uploaded Date	UserName	Contact Date	Location	Duration	
Casework Contact Note 7/6/20	Casework Contact Note	6/25/2020 9:32:07 PM	Amy Johnson	7/6/2020 9:39:00 AM	Current Placement	85	Select

The document name can be edited by clicking the pencil icon on the right side of the grid. To view the document, click select. If a document was uploaded in error, contact your Provider Administrator to request deletion.

NOTE:

- Only PDF, TIFF, and JPEG formats can be uploaded.
- Files must be 50 MB or smaller to be uploaded.
- Images should be saved in JPG format (rather than converted to PDF format).

The following error will display if the file type is not one listed above.

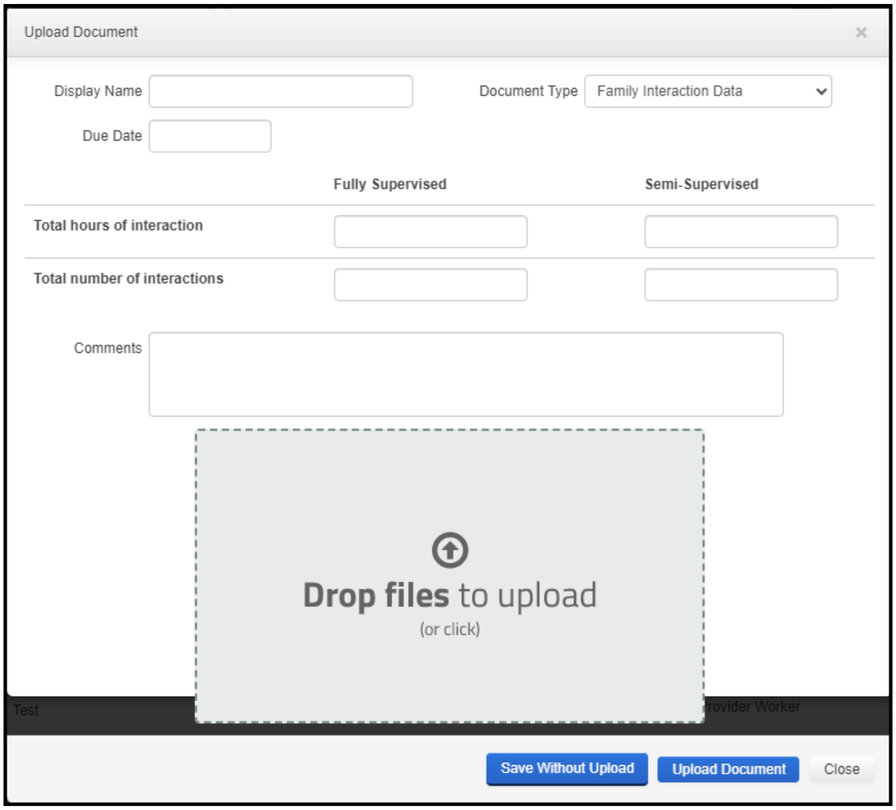
Error
File not allowed. Only PDF, TIFF and JPEG files are allowed

<u>Document Upload Notification to Assigned HHS Worker</u>

The HHS worker assigned to the placement or service case will automatically receive an email notification from JARVIS if a document has been uploaded for a child on their caseload.

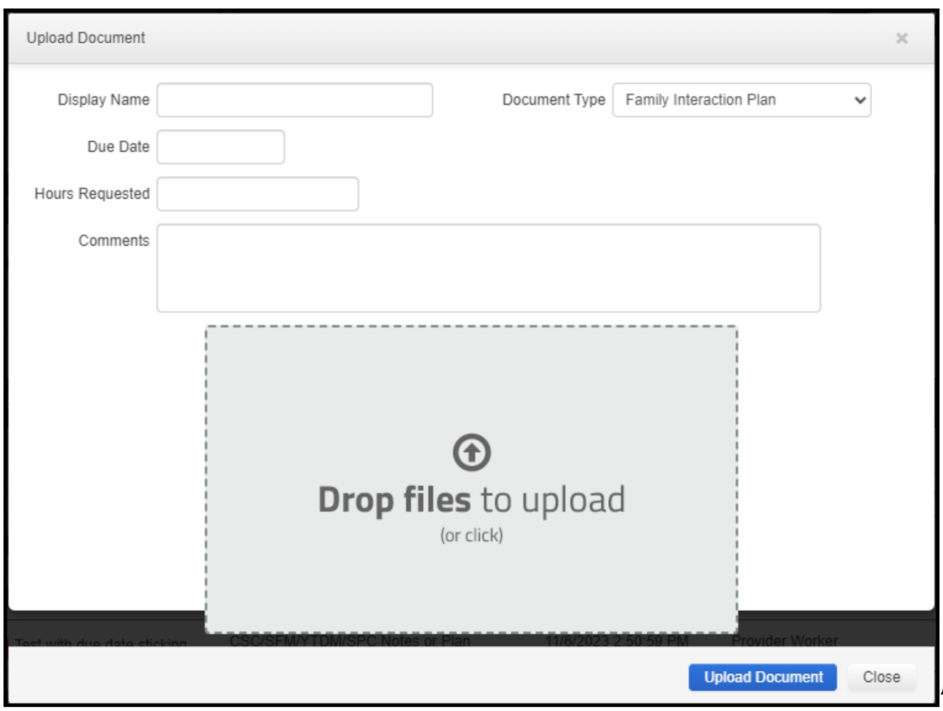
Family Interaction Data

Family Interaction Data can be entered on Family Interaction services without uploading a document. Enter the Due Date along with the Total Hours and Total number of Interactions under the Fully Supervised and/or Semi-Supervised columns. Then Add a file to upload or click "Save Without Upload" to save Family Interaction details without a document uploaded.



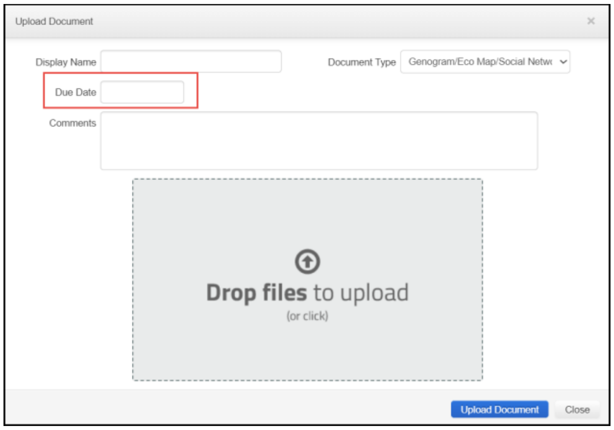
Family Interaction Plan

Enter the Due Date, total number of Hours Requested, and upload the Family Interaction Plan.



Genogram/EcoMap/Social Network Map

The due date is required when uploading this document type.

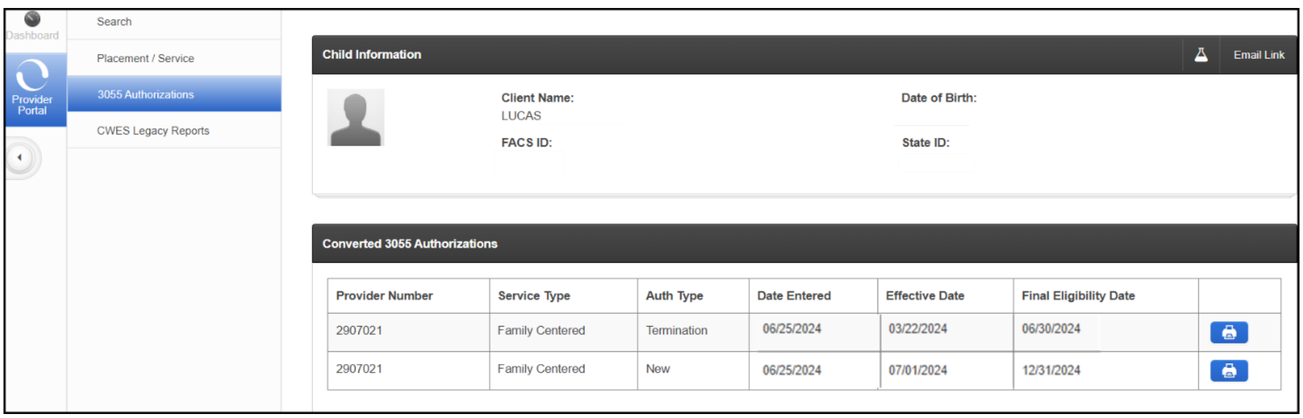


3055 Authorizations

Providers can access conversion 3055 Authorization forms that were auto-generated for:

- The conversion of active group care placements to QRTP placements on 4/1/20.
- The conversion of active FSRP services to Solution Based Casework on 7/1/20.
- The conversion of active SBCW services to Family Casework on 7/1/24.

1. Once a client is selected from the search, click on the 3055 Authorizations tab.



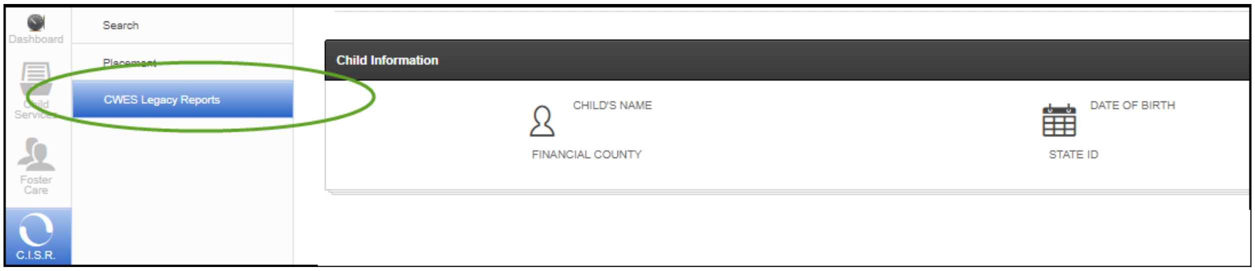
2. The Referral and Authorization Forms grid will display:
   - A Termination 3055 Authorization for the previous service codes.
   - A New 3055 Authorization for the new service codes.

3. Click on the printer icon next to the record to access a PDF of the 3055 authorization.

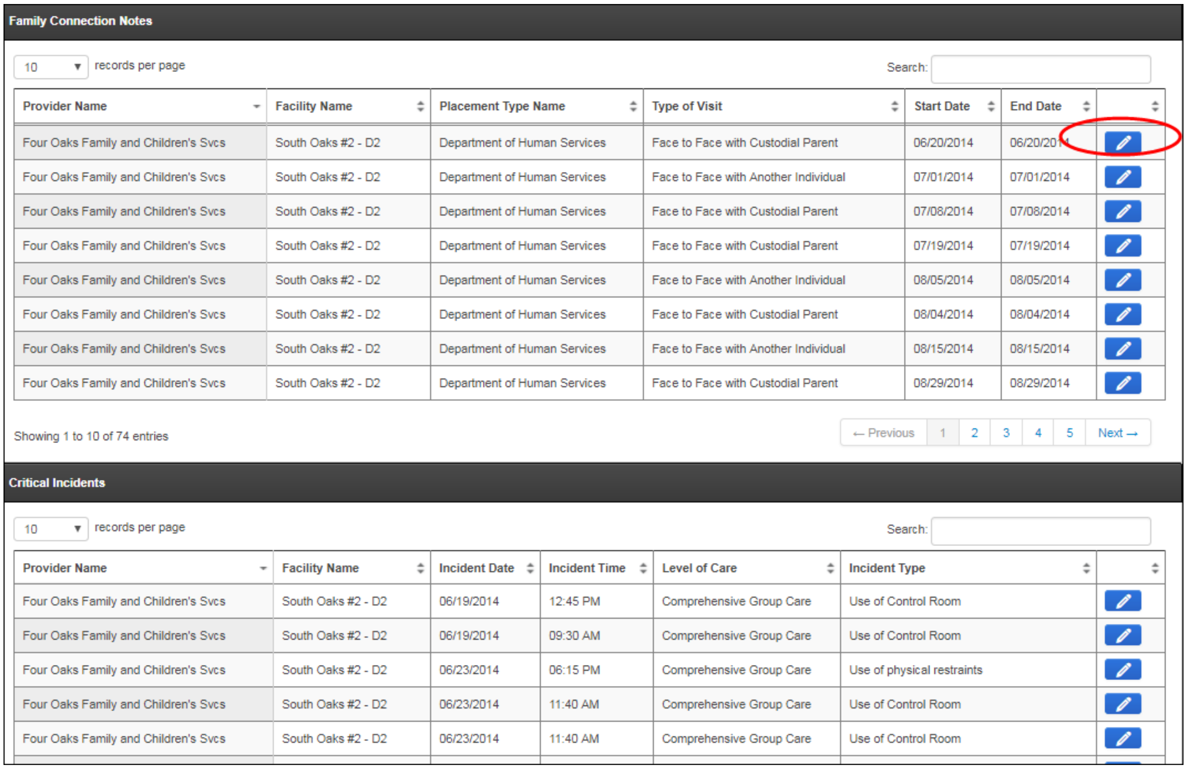
CWES Legacy Reports

The screen will display a list of all Family Connection Notes and Critical Incident entered for the client in the CISR Module between 7/1/17 and 7/27/18 and in the CWES system prior to 7/1/17. Facility staff will only be able to view legacy data previously entered by their specific provider.

1. Once a client is selected from the search, click on the CWES Legacy Reports tab.



2. A list of Family Connection Notes and Critical Incidents entered previously in the CISR Module or the CWES application prior to 6/27/18 will display.



Family Connection Notes

10 records per page Search:

Provider Name	Facility Name	Placement Type Name	Type of Visit	Start Date	End Date	
Four Oaks Family and Children's Svcs	South Oaks #2 - D2	Department of Human Services	Face to Face with Custodial Parent	06/20/2014	06/20/2014	
Four Oaks Family and Children's Svcs	South Oaks #2 - D2	Department of Human Services	Face to Face with Another Individual	07/01/2014	07/01/2014	
Four Oaks Family and Children's Svcs	South Oaks #2 - D2	Department of Human Services	Face to Face with Custodial Parent	07/08/2014	07/08/2014	
Four Oaks Family and Children's Svcs	South Oaks #2 - D2	Department of Human Services	Face to Face with Custodial Parent	07/19/2014	07/19/2014	
Four Oaks Family and Children's Svcs	South Oaks #2 - D2	Department of Human Services	Face to Face with Another Individual	08/05/2014	08/05/2014	
Four Oaks Family and Children's Svcs	South Oaks #2 - D2	Department of Human Services	Face to Face with Custodial Parent	08/04/2014	08/04/2014	
Four Oaks Family and Children's Svcs	South Oaks #2 - D2	Department of Human Services	Face to Face with Another Individual	08/15/2014	08/15/2014	
Four Oaks Family and Children's Svcs	South Oaks #2 - D2	Department of Human Services	Face to Face with Custodial Parent	08/29/2014	08/29/2014	

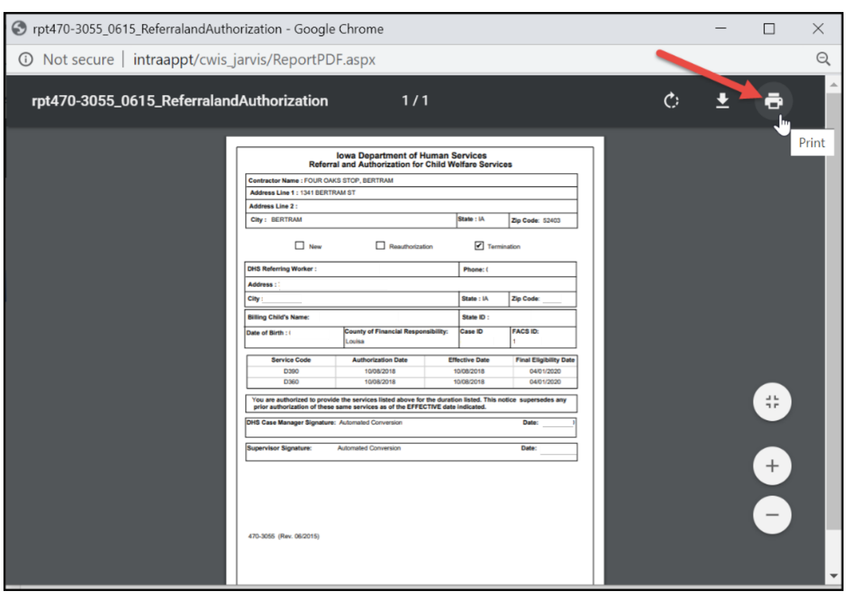
Showing 1 to 10 of 74 entries ← Previous 1 2 3 4 5 Next →

Critical Incidents

10 records per page Search:

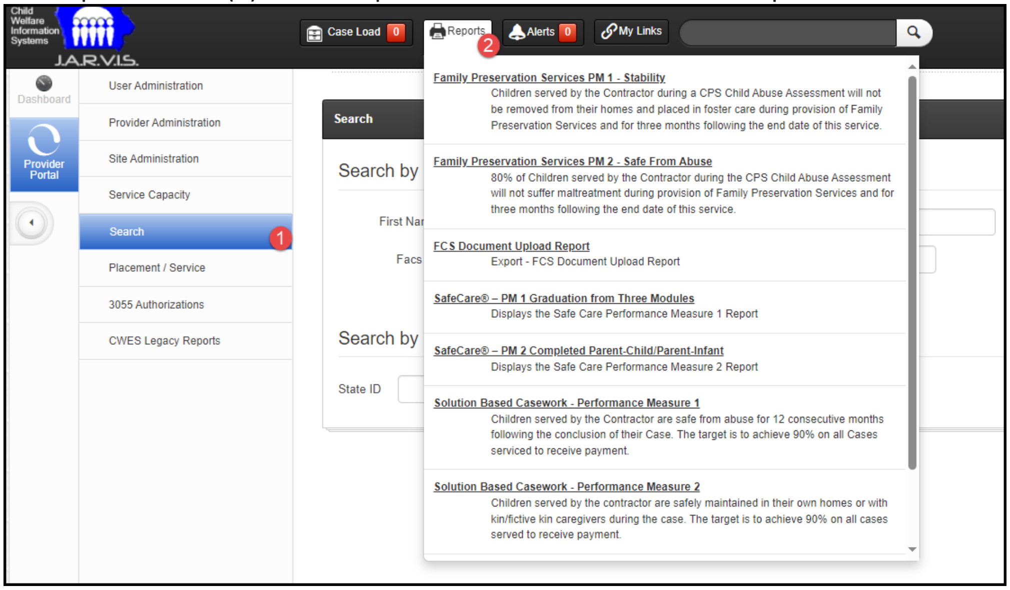
Provider Name	Facility Name	Incident Date	Incident Time	Level of Care	Incident Type	
Four Oaks Family and Children's Svcs	South Oaks #2 - D2	06/19/2014	12:45 PM	Comprehensive Group Care	Use of Control Room	
Four Oaks Family and Children's Svcs	South Oaks #2 - D2	06/19/2014	09:30 AM	Comprehensive Group Care	Use of Control Room	
Four Oaks Family and Children's Svcs	South Oaks #2 - D2	06/23/2014	06:15 PM	Comprehensive Group Care	Use of physical restraints	
Four Oaks Family and Children's Svcs	South Oaks #2 - D2	06/23/2014	11:40 AM	Comprehensive Group Care	Use of Control Room	
Four Oaks Family and Children's Svcs	South Oaks #2 - D2	06/23/2014	11:40 AM	Comprehensive Group Care	Use of Control Room	

3. Click on the paper and pencil icon to view details for a specific legacy entry. Note that Legacy data prior to 7/1/17 is read-only and cannot be modified.



Performance Measure Reports

Facility Administrators can access performance measure reports by clicking on the Search tab (1) and then the Report button (2) on the top header. Click on one of the 7 reports listed in the dropdown menu.



The following 8 reports are available:

1. Family Preservation Services PM 1- Stability *
2. Family Preservation Services PM 2- Safe From Abuse *
3. FCS Document Upload Report
4. SafeCare- PM 1 Graduation from Three Modules
5. SafeCare- PM 2 Completed Parent-Child/Parent-Infant
6. Solution Based Casework- Performance Measure 1 *
7. Solution Based Casework- Performance Measure 2
8. Solution Based Casework- Performance Measure 3 *

*Indicates that specific date parameters must be used on the report filters. The first date of a given month but be entered as the Start Date and the last date of a given month must be entered as the End Date. The maximum End Date that can be entered is specific to the performance measure.