

Monthly Case Worker Contacts

Note: In order to create a case note, an assignment to the case is not needed. Additionally, a case note can be created on a closed case.

Introduction:

The following guide walks through how to enter a case note to meet the Federal mandate on monthly case worker contacts with children and juveniles in out of home care. The following five data criteria must be met in order for a face-to-face contact to be included in the count of those submitted for federal reporting purposes:

1. To count as a successful case worker contact for a particular month, the Date on the case note must be during that calendar month.
2. To count as a successful case worker contact for a particular child, that child **MUST** be selected as a participant on the case note.
3. You may choose any Category (except Fiscal) and the Type **MUST** be 'Face-to-Face' (or 'Initial Face-to-Face' which is only available in the Initial Assessment and Ongoing categories).
4. The case note **MUST** have a value selected for the Face-to-Face Location drop-down. Select 'Out of Home Care' when visiting the child where he or she is currently placed.
5. To count as a successful caseworker contact, the Face-to-Face Result drop-down must have 'Occurred' as the selected value.

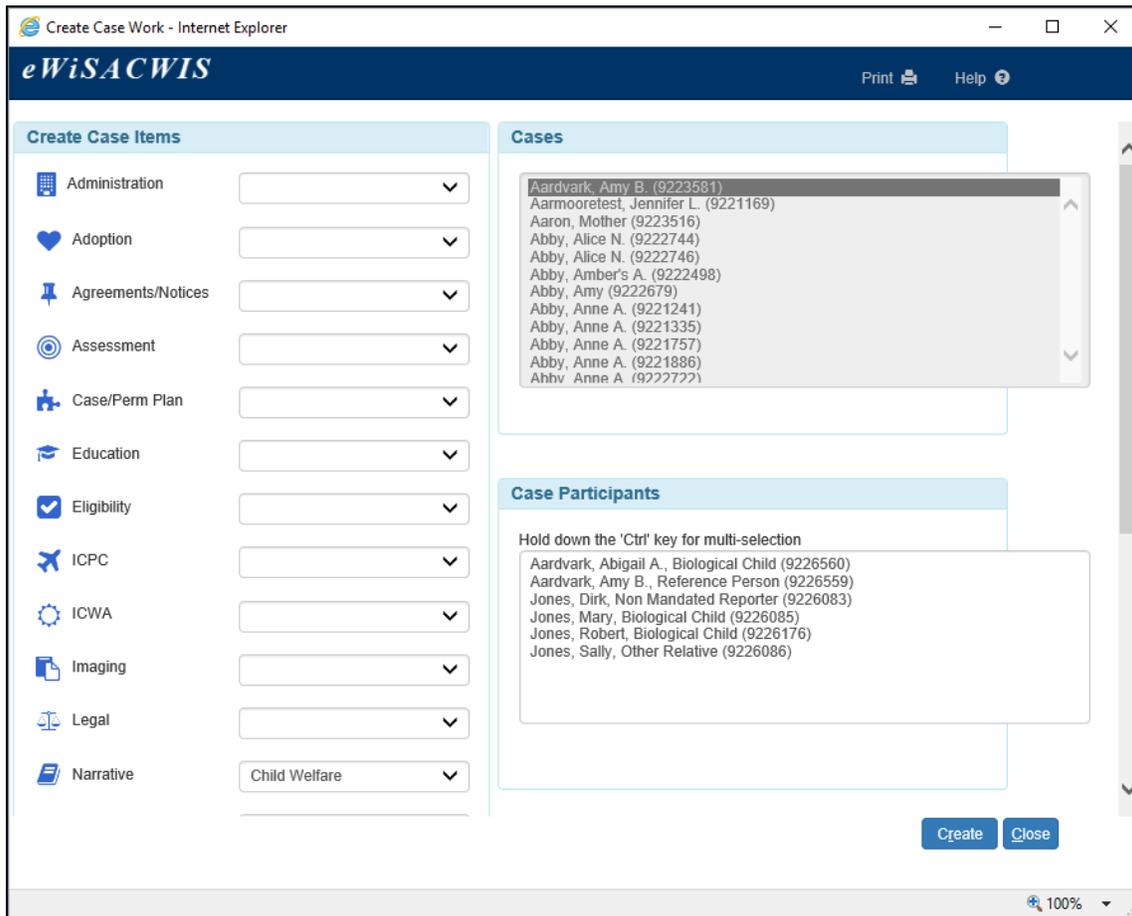
Documenting Monthly Case Worker Contacts:

Creating Case Notes on Assigned Cases

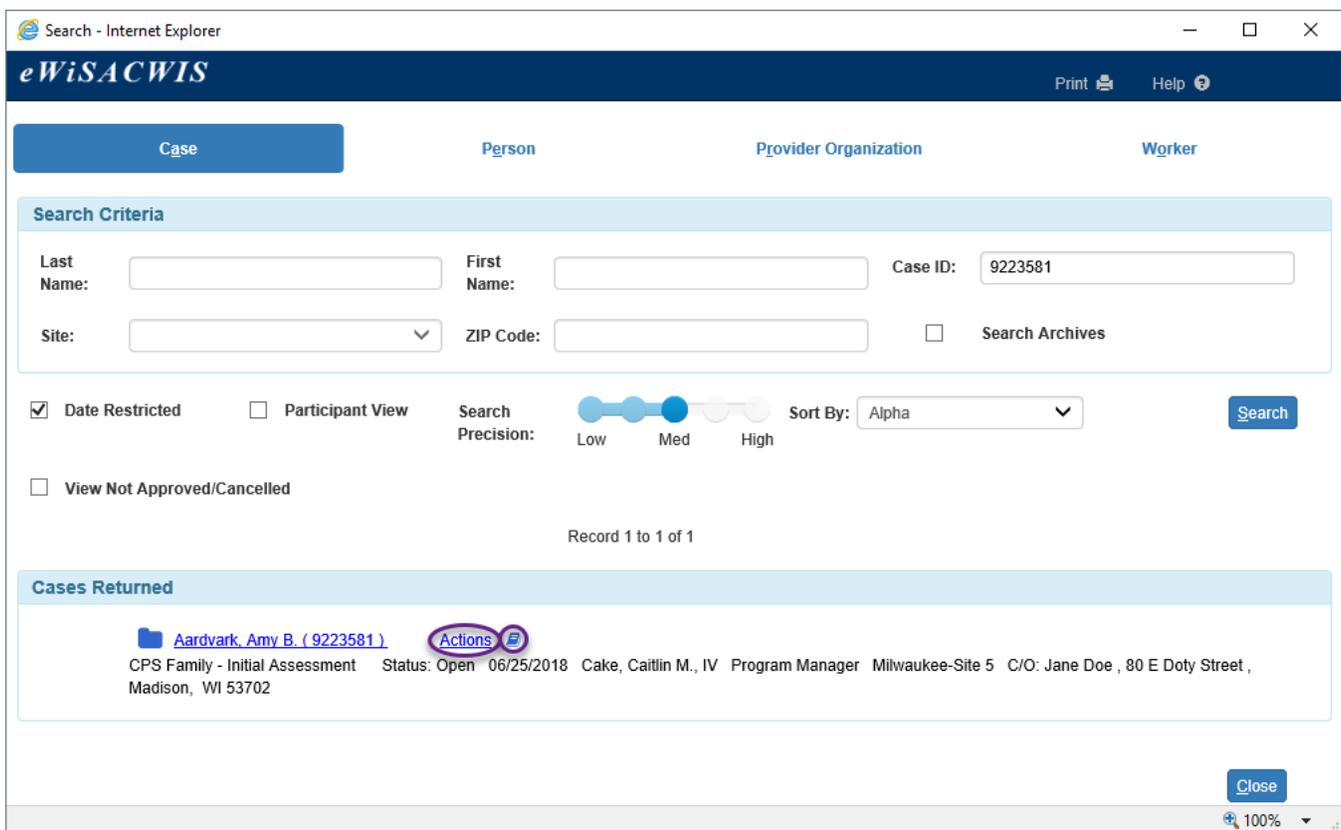
1. Create a case note using one of these methods:
 - a) From your desktop, go to the Cases tab and click the Case Work hyperlink [▶ Create case work](#) or select "Create Case Note" from the actions drop-down next to the specific case to open the Create Case Work page:



- Select the Category from the Narrative drop-down.
- Select the Case.
- Selection of Case Participants is optional. Use the 'ctrl' key to select more than one participant.
- Click Create to open the Case Notes page.



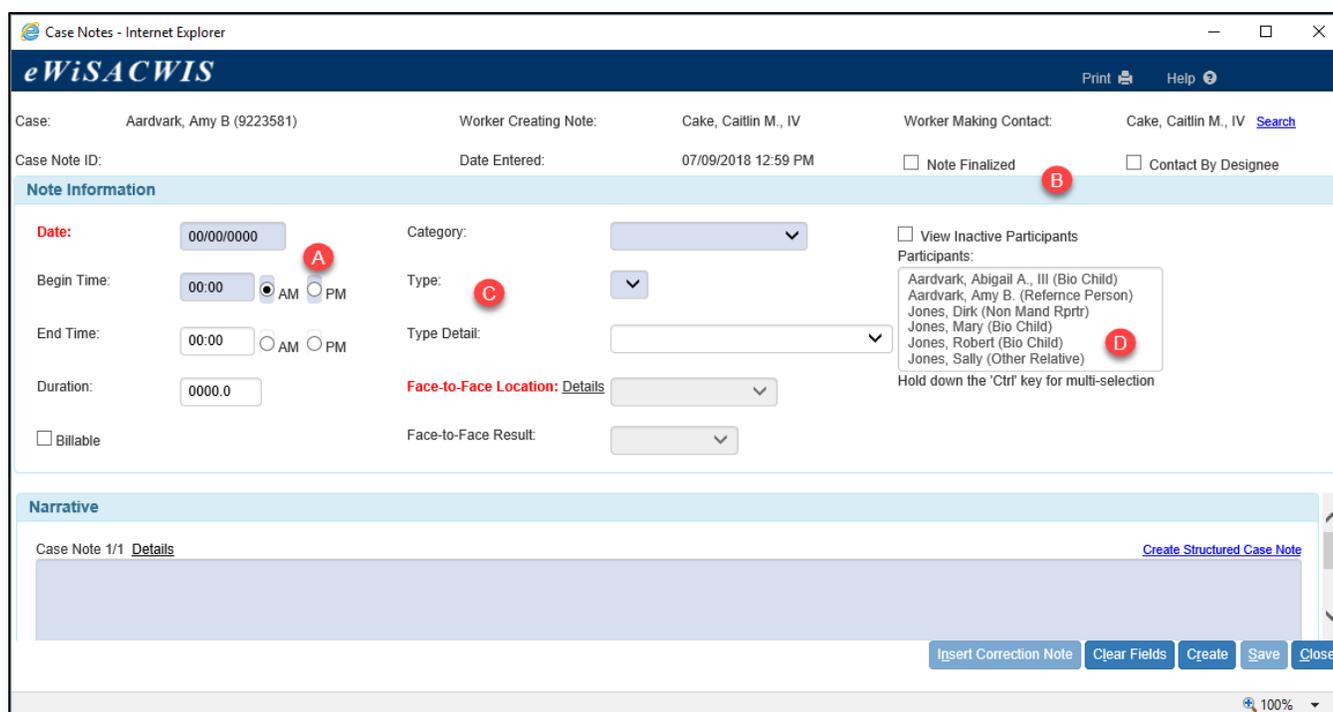
b) From Search, click the [Actions](#) hyperlink or the Create Case Note icon  next to a case name.



Select the Create Case Note radio button and click Continue to open the Case Notes page.



2. On the Case Notes page, select the appropriate values as noted below. Hover the cursor over the Details flair next to Face-to-Face Location and in the Narrative section for Caseworker Contact policy guidance.



- A. **Date:** The date documented here will identify the month that will count for the contact.
- B. **Contact by Designee** Check box: Per policy agencies may use other professional staff as designees to complete face-to-face contacts. Staff includes those trained to assess safety, facilitate permanence, ensure a child's well-being, and evaluate the progress of a child and

family's case. To indicate a Case Note completed by a designee, select the Contact by Designee checkbox.

C. Required Fields:

1. **Category:** Choose any (except Fiscal)
2. **Type:** Must be 'Face to Face' (or 'Initial Face to Face' which is only available for the Initial Assessment or Ongoing Categories)
3. **Face-to-Face Location:** Should be 'Out of Home Care' when visiting the child at the out of home placement.
4. **Face-to-Face Result:** Must be 'Occurred' for the note to count as a face-to-face contact with a child placed in out of home care.

D. **Participants:** The child(ren) that had face-to-face contact **MUST** be selected.

3. To finalize the note, select the Note Finalized check box and click Save.