Permanency Consultation
~~~Scribe Instructions~~~

A. *Prior to start of the Permanency Roundtable (PRT), the scribe will need:*

1) A copy of the PRT case schedule.

2) Assignment to the case being roundtabled (or a plan to have the assigned worker or permanency consultant log into eWiSACWIS, as they should have assignment to the case.)

3) Knowledge as to whether this is an *Initial* PRT or a S*ubsequent* PRT (re-round.)

   a. If a PRT was held previously, a "Permanency Consultation" row appears (Table 1) under the case's *Permanency Consultation* icon for the child and any PRT'd siblings. Open each PC to check for any "Pending" action steps. Ask worker if they should remain "Pending" and copy over to the new PC or, if not, select appropriate status from the drop-down. A status other than "Pending" will also require a date be entered to reflect when the status changed. This can be an estimate provided by the worker. Click Save button and close PC. Refresh screen before creating new PC.
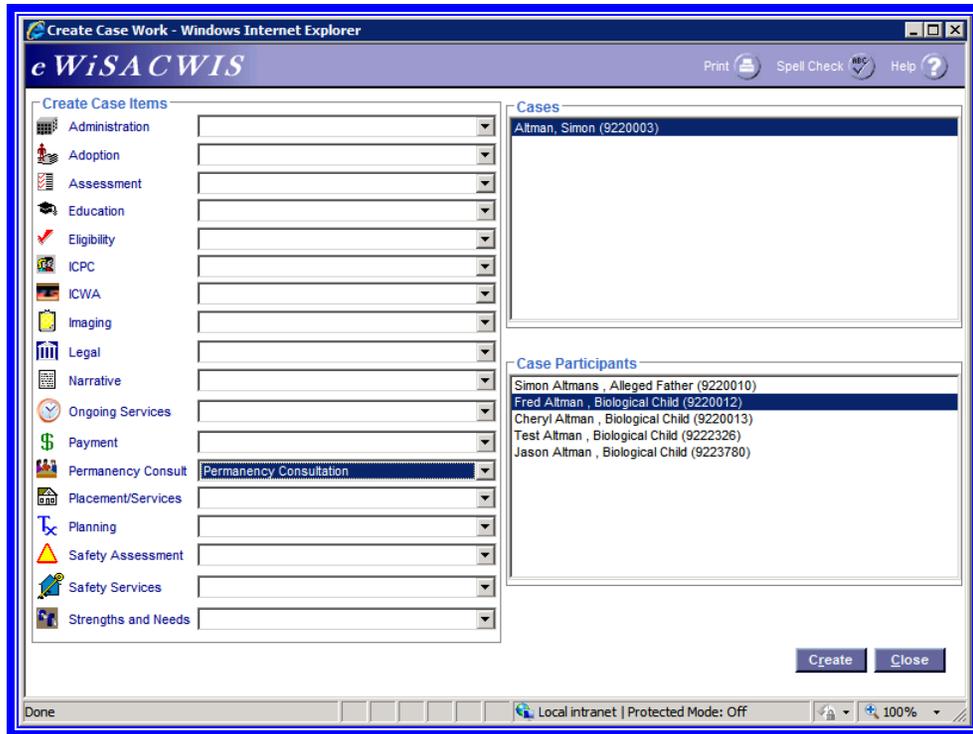
Table 1

4) Knowledge as to how many children this case/PRT will address. If two or more siblings are being roundtabled, you will create a Permanency Consultation for the first child and *upon completion* of the PRT process, use the "copy over" function for each sibling. (Copying over too soon will prevent the auto-fill function from copying into the sibling's PC.) See section D., "Sibling Copies" for more information.

B. *At the PRT, create the Permanency Consultation (PC) template:*

Whether this is an Initial or a Subsequent PRT, create a new template:

1) From the desktop, click on the Case Work hot button to open the **Create Case Work** page.

2) On the **Create Case Work** page (Table 2) go to the *Permanency Consult* icon drop-down and select "Permanency Consultation." Select the appropriate Case and Case Participant. Click Create. This will open the **Permanency Consultation** page.
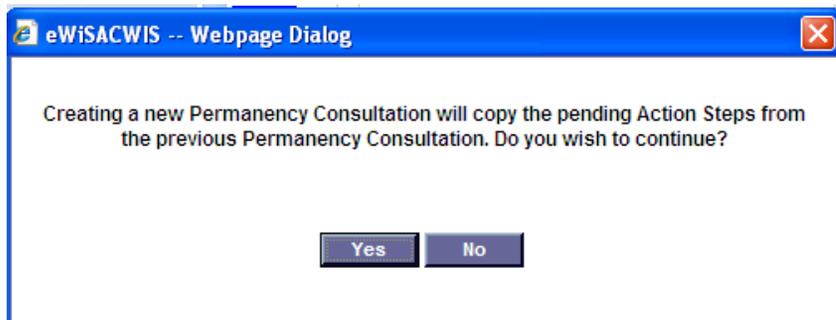
Table 2

3) If a previous PC exists for the child and any "pending" action steps remain (see A3 to prevent this), a pop-up will appear (Table 3.)
- To copy over the pending action step into the new template, click Yes button. Enter a new, future completion date for any carried over action steps.
- To avoid copy-over and update the pending action step to "Completed", etc, click No button. The system will bump you out to the outliner where you can click on the previous PC and update action steps. Refresh desktop prior to attempting to create new PC.

Table 3

C. *Begin to fill in fields on the Permanency Consultation template:*

TIP: The PC cannot be saved until all blue sections have data entered. This can be a concern if eWiSACWIS or the internet freezes or "goes down". Many scribes put a letter or symbol in each blue section at the beginning of the PRT, which allows the PC to be saved through-out the PRT process. This way if there is a connection issue, the sections that were completed will not be lost.

1. **Plan Information** group box (Table 4).
The names of the primary worker, his/her supervisor, and the permanency consultant (if assigned to the case) pre-populate when the PC is created. Using the "Search" hyperlink, you can search for a different associated worker. Workers will generally have a desk icon in front of their names.

- **PC Type** box**.** This is calculated by eWiSACWIS upon clicking the Save button. The calculation is done by comparing the PC Date to the child's most recent removal from home. The number of months between the two dates is displayed. If the child is not in an Out of Home Placement as of the PC Date, the PC Type will display a default value of 1 Month.
- **Permanency Consultation Finalized** checkbox. At the *conclusion* of the PRT, and only after needed sibling templates have been copied, filled in and checked for accuracy, the **Permanency Consultation Finalized** checkbox must be checked. See section D- 4 for more information about this step *done at the end* of the PRT.

Table 4

2. **Participants** group box. All present at the Permanency Consultation must be documented here (Table 5.) The primary worker and his/her supervisor will already appear, as will the permanency consultant when assigned to the case. To add participants, click the Insert button to open the **Person Search** box. Use the "Role" drop-down field to assign a role to each participant (Table 5). Click the "Remove" link to remove a participant if not needed. If the participant is not found, s/he can be created in eWiSACWIS. See 2 a), below.

Table 5

2 a) **Create a Participant not found in eWiSACWIS**:
- If after searching out a person the "No matching data…" pop-up appears, use the Close button to close the pop-up.
- Click on Create button.
- On **Basic Tab**, first and last name of person being sought will pre-fill. Update "U.S. Citizenship Status" field to reflect "U.S. Citizenship."
- Click Save button.
- Click Close button.
- Click Continue button. Person now appears on template. Select appropriate role from drop-down.

Steps 3 and 4, below, require that *questions be asked of the worker* at the end of Phase III - Clarify & Explore. If the facilitator moves on to Phase IV - Brainstorming without first addressing these, please remind him/her. The facilitator may ask you to pose the "Disclosure" questions to the worker, shown below. If so, please read them one at a time and, once answered, select the appropriate response from the corresponding drop-down field. You can share the time-frames provided within the drop-downs to assist the worker, as specific dates are not needed.
For sibling groups, make note of Perm Goals of Record, Perm Goals "proposed," as well as any siblings' Legal Permanency Status to ensure these are accurate and child-specific in any copied-over PCs.

3. **Disclosure** group box (Table 5.) Based on the ongoing worker's answers, select the time-frame in which the following have occurred:

Question: "**When was the last time you made full disclosure to the parents?**"
  *It may help the worker to read the "full disclosure" definition under the "Details" flare
  *Make note of this answer on a sheet of paper for any siblings being roundtabled. The answer selected now will pre-fill into the copy, and may be inaccurate for the sibling.

Question: "**When was the last time you talked with the child about with whom s/he would like to have permanency?**"
  *Make note of this answer on a sheet of paper for any siblings being roundtabled. The answer selected now will pre-fill into the copy, and may be inaccurate for the sibling.

4. **Child's Permanency Goals** group box (Table 6.) Enter the **Current** and **Concurrent Goal of Record,** as identified by the worker, as well as the **Legal Permanency Status** (LPS) agreed upon by the team (be careful to never set LPS to "Permanency Achieved.") The roundtable's **Proposed Permanency** (and **Concurrent) Goals** will be discussed at the end of Phase IV – Brainstorming. Select the appropriate value in each field. Use the "Definitions" hyperlink to access a definition of each **Legal Permanency Status**, if needed.

  *Make note of any siblings' Permanency Goals on a sheet of paper. The answer selected now will pre-fill into the copy, and may be inaccurate for the sibling

Table **6**

5. **Brainstorming** group box (Table 7.) Document all ideas proposed for each of the five questions. Enter ideas next to the appropriate question, when at all possible, even if the facilitator has inadvertently placed an idea on the wrong sheet of paper.

Table 7

6. **Action Steps** group box. Document the action to be taken, by whom and by when as determined by the facilitator (Table 8.)
- "Assigned To" field – Select the name of the person assigned to the action step from the drop-down.
- "Target Date" field – Enter date proposed by the worker.
- "Status" field – Enter "Pending."
- "Description" field - Enter the action step as written by the facilitator. Wait to enter action step until the facilitator and worker are in agreement as to how the step is to be written. Please check spelling and grammar to prevent future confusion.

Click the Insert button to add Action Steps.

Table 8

Note: Action Steps with a "Pending" status will continue to have the "Status" field enabled and editable even after the "Permanency Consultation Finalized" checkbox is selected.

7. **Systemic Barriers Identified** group box (Table 9.) Barriers may or may not be identified on any given case.
When applicable:
- Choose a "Barrier Category" from the drop-down, followed by a "Barrier Type."
- If applicable, enter narrative in the "Description" field to further describe the barrier. The scribe should ask for clarification from the facilitator if s/he is unsure how to describe the barrier or under which category or type the barrier belongs.

- Click the Insert button to document additional "Systemic Barriers."

Note: "Parking Lot" issues, often recorded near the "Systemic Barriers" list, are <u>not</u> to be documented in eWiSACWIS.

Table 9

8. **Next Consultation** group box. Enter a date, five months out, for the next consultation to be held regarding the case. The date need not be exact.

9. **Consultation Rescheduled** checkbox. Check this if a future PRT has been scheduled for this case. This box can be left blank without errors resulting.

D. Sibling copies

When 2 or more siblings are being roundtabled:

1. **Options** box. After the first child's PC is completely filled in, copy the current Permanency Consultation to another child on the same case by selecting "Copy Permanency Consultation" from the "Options" drop-down and clicking the [Go] button. You will be presented with a **Permanency Consultation Copy** page (Table 10), where you can select, one at time, the radio button for each sibling.

Table 10

2. In the copied PC, three fields will be *blank* and must be filled in:
   - Permanency Consultation Date
   - Legal Permanency Status
   - Next Consultation Date

   Some fields will copy over but will *need checking to ensure data is correct* for the sibling. Verify or correct the following:
   - Ongoing worker (in case siblings have different workers)
   - Current Permanency Goals of Record
   - Proposed Permanency Goals
   - Action Steps
   - Full Disclosure with parent (time frame)
   - Full Disclosure with child/ "Last time you talked with child about with whom s/he would like to have permanency" (time frame)

3. **Finalized PCs** tab. This tab displays all finalized Permanency Consultations for the child (Table 11.) The information on this page cannot be edited. You can click the "PC Type" hyperlink to open the other finalized PCs in order to view them.

Table 11

4. **Permanency Consultation Finalized** check box. Once all information has been entered and any sibling's PC has been copied over and reviewed for accuracy, click the [Save] button on each template. Then check the **Permanency Consultation Finalized** checkbox on each PC. No changes will be possible after this point, except for updating the status of action steps.

5. Lastly, the system will present a question (Table 12), to which you will click on the [Yes] button. You can now safely close the PC on the desktop.

Table 12

Below, a blank copy of the Permanency Consultation follows.

DEPARTMENT OF CHILDREN AND FAMILIES
Division of Safety and Permanence
Bureau of Permanence and Out of Home Care

Permanency Consultation

Personal information you provide may be used for secondary purposes [Privacy Law, s. 15.04(1)(m), Wisconsin Statutes].

Child Information

Name – Child		Child ID	Rescheduled ☐ Yes ☐ No
Case Name		Case ID	
Permanency Consultation Date	Permanency Consultation Type	Permanency Consultation Finalized	

Contacts

	Name
Assigned Worker	
Assigned Supervisor	
Agency Administrator	
Permanency Consultant	
External Consultant	
Policy Expert	
Scribe	
Other	

Full disclosure has been made:

☐ Within past month ☐ 1 – 3 months ago ☐ 4 – 6 months ago ☐ 7 – 9 months ago ☐ 10 – 12 month ago ☐ More than a year ago ☐ Uncertain ☐ N/A

Ask Case Manager: When was the last time you talked with the child about with whom he / she would like to have permanency?

☐ Within past month ☐ 1 – 3 months ago ☐ 4 – 6 months ago ☐ 7 – 9 months ago ☐ 10 – 12 month ago ☐ More than a year ago ☐ Uncertain ☐ N/A

CURRENT Goal of Record

☐ Adoption   ☐ Independent Living   ☐ Long Term Foster Care   ☐ Permanent Placement with fit and willing relative

☐ Reunification   ☐ Sustaining Care (TPR)   ☐ Transfer of Guardianship

CURRENT Concurrent Goal of Record

☐ Adoption   ☐ Independent Living   ☐ Permanent Placement with fit and willing relative   ☐ Reunification

☐ Sustaining Care (TPR)   ☐ Transfer of Guardianship   ☐ N/A

Proposed Permanency Goal Recommended by Team

☐ Adoption   ☐ Independent Living   ☐ Sustaining Care (TPR)   ☐ Permanent Placement with fit and willing relative   ☐ Reunification   ☐ Transfer of Guardianship

Proposed Concurrent Permanency Goal Recommended by Team

| ☐ Adoption | ☐ Independent Living | ☐ Sustaining Care (TPR) | ☐ Permanent Placement with fit and willing relative | ☐ Reunification | ☐ Transfer of Guardianship |

Instructions to Consultation Team

Please rate the **child's current legal permanency status** based on the Ongoing Case Manager and Supervisor presentation and clarifying / exploring questions before beginning to discuss any specific strategies or actions to take following the consultation (Brainstorming, Phase IV). This rating scale must be completed by the team. This scale will be used to update the child's permanency status periodically.

Child's Current Legal Permanency Status [Scale adapted from Human Systems and Outcomes, Inc., scale used in Indiana Quality Service Review Protocol (2007)].

Rate the child's **current** legal permanency status as described below based on existing evidence.

Child has legal permanency (reunification with safe case closure expected, adoption, or legal guardianship).	☐ Permanency achieved
Child is in a family setting that the child, the caregivers, and the casework team believe is lifelong, and the caregivers and child are committed to formalizing the relationship through adoption or transfer of guardianship; – OR – Child is in a stable living situation with own parents (not a trial reunification) and identified safety threats have been eliminated.	☐ Very good permanency status
Meets criteria of "Very good permanency status" but in accordance with policy a consultation is not required.	☐ Very good permanency status – No consultation required
Child is in a family setting that the child, caregivers, and case workers believe is lifelong; a plan is in place to maintain safety and stability; the child, if old enough, and the caregiver(s) are committed to the plan; and adoption / guardianship / reunification issues, if any, are near resolution. – OR – Child is in a stable living situation with own parents (not a trial reunification) and identified safety threats are being controlled through an in-home safety plan.	☐ Good permanency status
Meets criteria of "Good permanency status" but in accordance with policy a consultation is not required.	☐ Good permanency status – No consultation required
Child is in a family setting that the child, caregivers and case workers believe could endure lifelong; a plan is in place to ensure safety and stability are achieved, and the child, if old enough, and the caregiver(s) are committed to the plan; and adoption / guardianship / reunification issues, if any, are being addressed; – OR – Child is in temporary placement but a transition is planned and child is ready to move to identified safe, appropriate, caregivers who are willing to provide legal permanency; a child and family plan for safety and permanency is being implemented; and the child, if old enough and caregiver(s) are committed to the plan.	☐ Fair permanency status
Child is in a family setting that the child, caregivers and casework team feel could endure lifelong, a plan to achieve safety and stability is being developed, and it is uncertain if the relationship will be formalized legally. – OR – Child is in temporary placement, and likelihood of reunification or a legally permanent home is uncertain; adoption / guardianship issues are being assessed; and concurrent permanency plans, if any, are uncertain or problematic.	☐ Uncertain permanency status
Child is living in a home that is not likely to endure or is moving from home-to-home due to safety and stability problems, failure to resolve adoption / guardianship issues, or because the home is unacceptable to the child; – OR – Child remains in a temporary home without a realistic or achievable legal permanency goal; and concurrent permanency plans, if any, have stalled or failed.	☐ Poor permanency status

Brainstorming

Please consider the following questions during Phase IV: Brainstorming

What will it take to achieve permanency?

What can we try that HAS been tried before?

What can we try that has NEVER been tried before?

How many things can we do concurrently?

How can we engage the youth in planning for permanence?

Action Steps

Action – The Specific Task Planned	Assigned To	Target Completion Date	Status

Systemic Barriers Identified

Barrier Category	Barrier Type

Next Consultation Date: