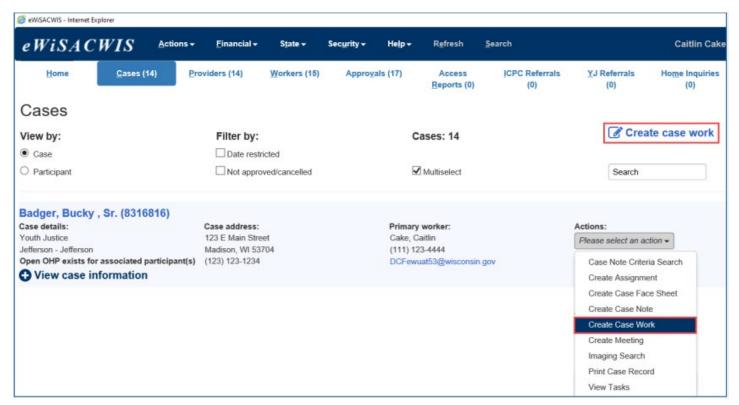
## **Congregate Care Referral**

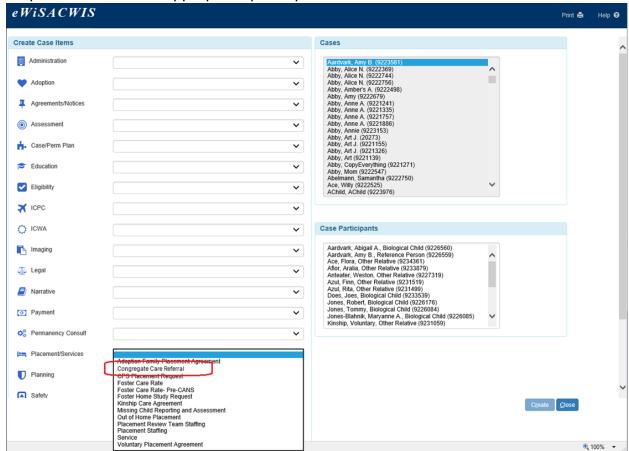
The Congregate Care Referral page allows child welfare professionals to submit referrals for placement in group care settings in eWiSACWIS and is sent to group care providers via the SYNC website (Supporting Youth and Children).

**Note:** To create a Congregate Care Referral, an assignment to the case is needed. Additional security is needed to create this piece of work.

From your desktop, select the cases tab. Click the Create case work hyperlink or select Create
Case Work from the Actions drop-down next to the specific case to open the Create Case Work
page.



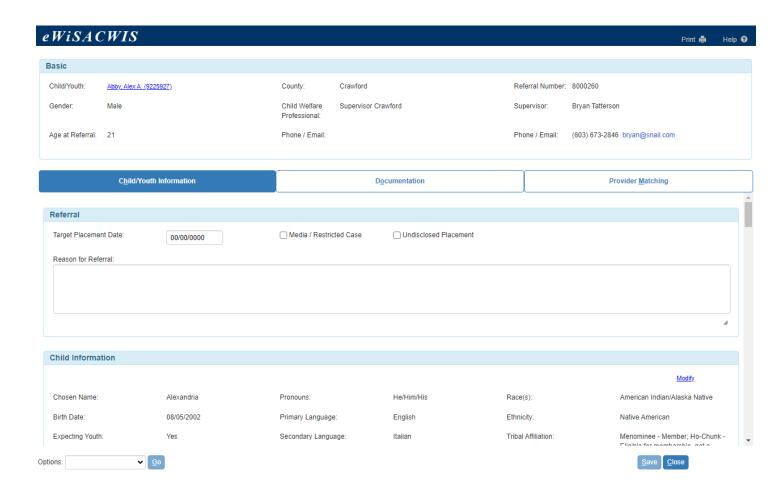
2. On the Create Case Work page, select Congregate Care Referral from the Placement/Services drop-down. Select the appropriate participant and click the Create button.



3. The Child/Youth Information tab is made up of several sections.

**Referral:** This box displays the target placement date (user entered field), reason for referral (user entered field), and radio buttons to indicate if the case is a media/restricted case and/or if the placement is undisclosed. Select the appropriate radio button if applicable.

**Child Information:** This box displays the demographic information of the child that the referral is created for. This information includes the chosen name, pronouns, race(s), birth date, primary language, secondary language, expecting youth, parenting youth, tribal affiliation, spiritual or religious affiliation, and preferred place of worship. This information prefills from the basic tab of the child's person management page. Click the Modify hyperlink to launch the Basic tab of the child's person management page in edit mode.



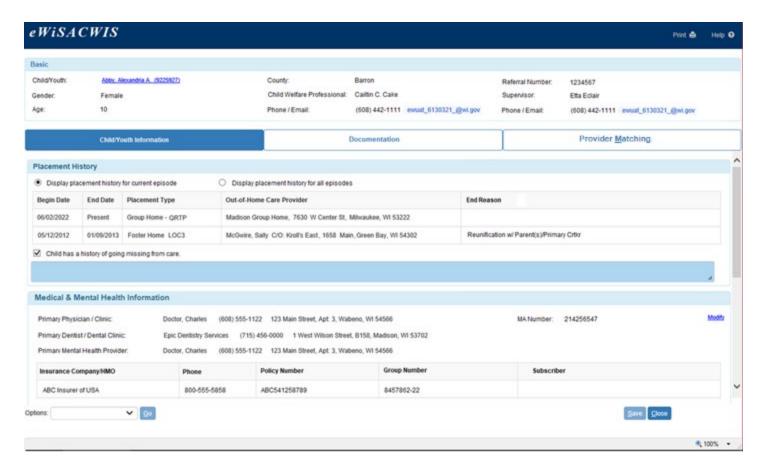
**Placement History:** This box displays the child's placement history. There is a user selectable radio button to display the placement history for the current removal episode. There is another user selectable radio button to display the placement history for all removal episodes. Selecting this radio button will show the full placement history of the child. Default for both radio buttons is not selected. When selected, the begin date, end date, placement type, name of the out-of-home care provider, and the ending reason will display in a table format.

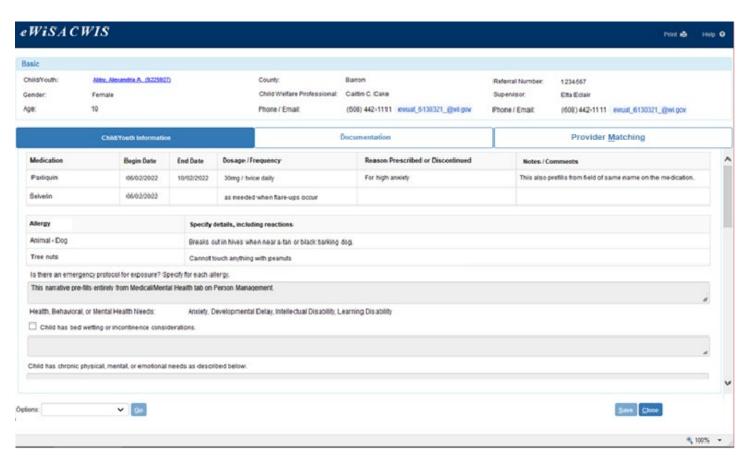
Select the radio button to indicate if the child has a history of going missing from care. When selected, a required narrative will display. Use the narrative box to describe the child's history of missing from care.

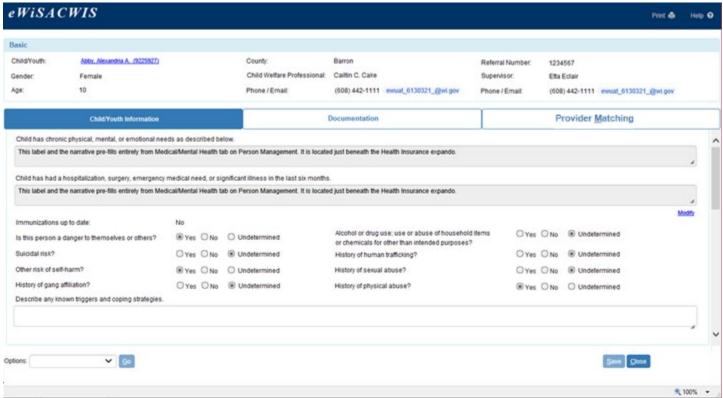
**Medical & Mental Health Information:** This box displays the child's medical and mental health information. This information includes the name, address, and phone numbers of the primary physician/clinic, the primary dentist/dental clinic, and the primary mental health provider. This box also includes a table displaying the insurance company/HMO information (phone number, policy number, group number, and subscriber), medication information (begin and end date, dosage/frequency, reason prescribed or discontinued, and notes/comments), allergy information, immunizations, and the health, behavioral, or mental health needs. This information prefills from the Medical/Mental Health tab of the child's person management page. The health, behavioral, or

mental health needs information prefills from the Supplemental Mental Health tab of the child's person management page. Click the Modify hyperlink at the top of this box to launch the Medical/Mental Health tab of the child's person management page in edit mode.

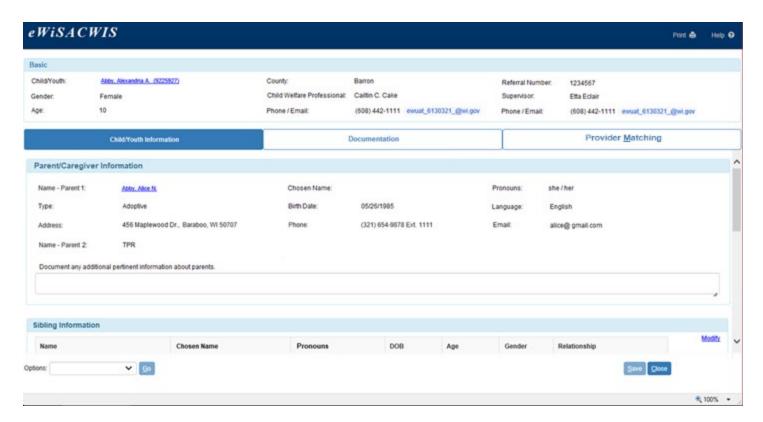
**Note:** The medication will not display if the end date of the medication is a date that is more than 180 days (6 months) earlier than the system date.



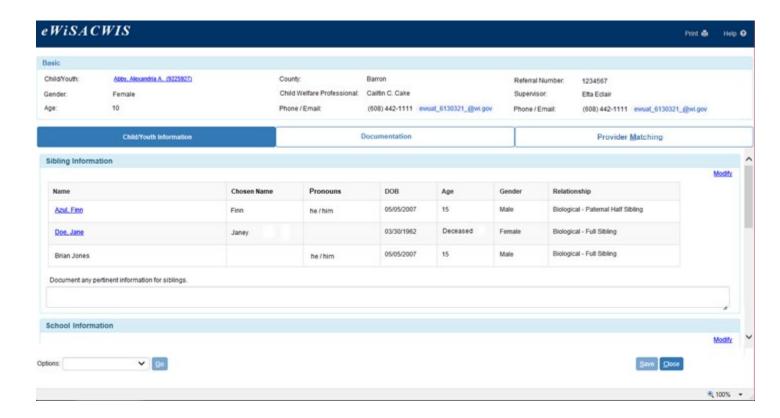




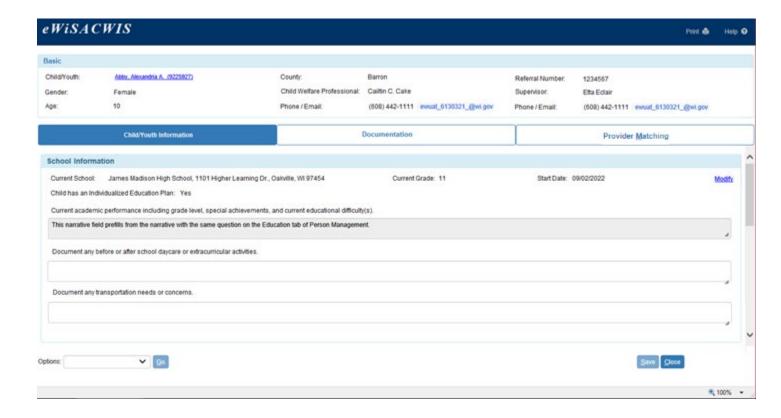
Parent/Caregiver Information: This box displays the parents/caregivers' names, chosen names, pronouns, parent type (mother/father, TPR, adoptive), birth date, language, address, phone number, and email address. This information prefills from the respective parent's person management page. Click the parents name hyperlink to launch the respective parent's person management in edit mode. Use the narrative text box to document any pertinent information regarding any the parents/caregivers.



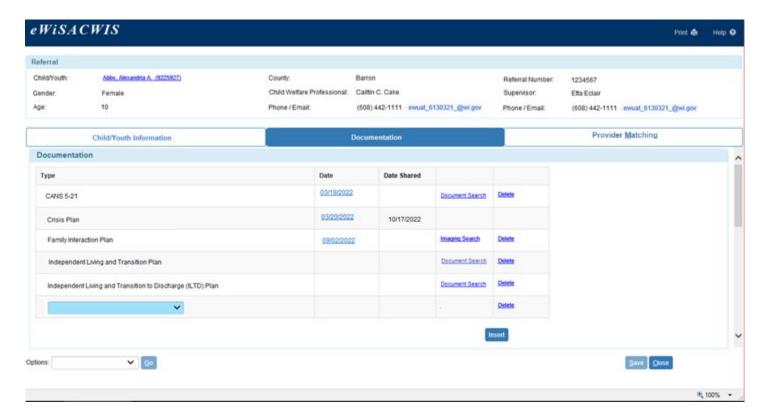
**Sibling Information:** This box displays the sibling(s) name(s), chosen name, pronouns, birth date, age, gender, and relationship to the child the referral is being created for. This information prefills from the Additional tab of the child's person management page. Click Modify to launch the Additional tab of the child's person management page in edit mode. Use the narrative text box to document any pertinent information regarding any siblings.



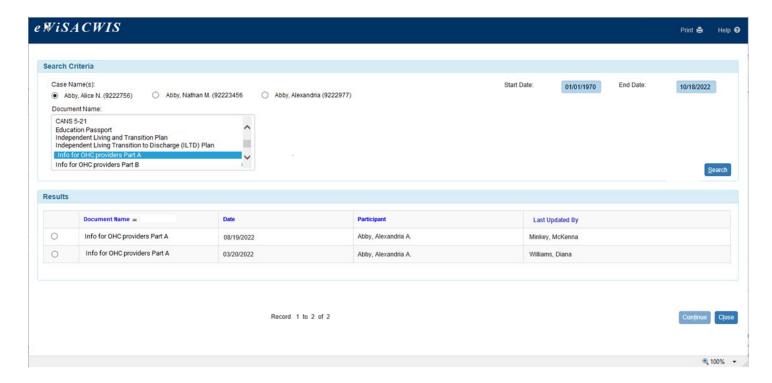
**School Information:** This box displays the current school, current grade, start date, individualized education plan (IEP) information current academic performance, before or after school activities, and transportation needs. This information prefills from the Education tab of the child's person management page. The first fields in this box are static text while the latter fields are user selectable checkboxes and user editable narrative fields.



4. The Documentation tab allows YJ/CPS Professionals to designate documents and images for sharing with a provider during the referral process. This tab also keeps a history of shared documents. The documents are displayed in a table with columns labeled Type, Date, and the Date Shared. Additionally, based on the type of the document for the row, the system displays either Imaging Search or the Document Search hyperlink. Click insert to upload the child/youth's documents. These documents will be shared with the provider along with the referral.



5. The Document Search (and Retrieval) page enables YJ/CPS Professionals to search for and select specific PDF files of eWiSACWIS documents for sharing with group care providers through SYNC. The start date and end date fields are required. The start date defaults to a date six months earlier than today's date. This cannot be a future date. The end date defaults to today's date and cannot be a future date or before the start date. Use the radio buttons next to each result to upload the selected document into the referral.

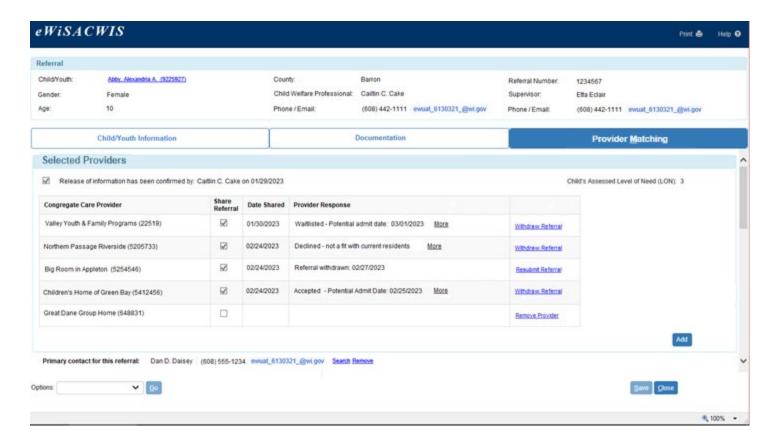


6. The Provider Matching tab allows the user to retrieve providers with whom the referral will be shared. This tab also contains the functionality to share and withdraw the referral from the providers that have been selected. An important **note** is that to refer youth to group care facilities, a release of information is required. County users must attest to the release of information being obtained, prior to sending a referral.

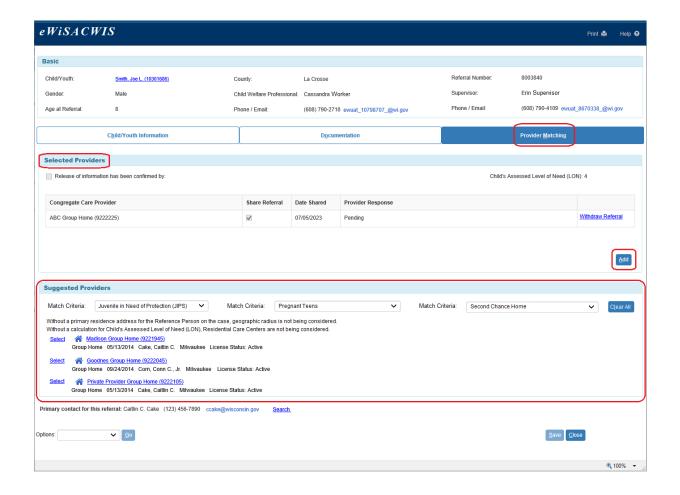
At the time of determining which group care facility or facilities to refer youth, the county user can choose various providers from the Suggested Providers group box or add new providers that are not already displayed on the screen from the Geographic Placement Resource page. While county users can select multiple group care facilities for whom to send the referral, they should still exercise discretion in choosing which providers can best meet the child's level of need. Once a referral is submitted, this screen will also display the results of the review by the group care facility.

Group care facilities will be able to add notes, via SYNC, to inform the county user of their provider response. Hover over the 'More' flare to display the provider response. Child welfare professionals can withdraw a referral after it's shared with the provider. This removes access to the referral for that provider. After a referral is withdrawn, a resubmit referral link will display to enable the share referral checkbox and allow the child welfare professional to resubmit the referral to that provider.

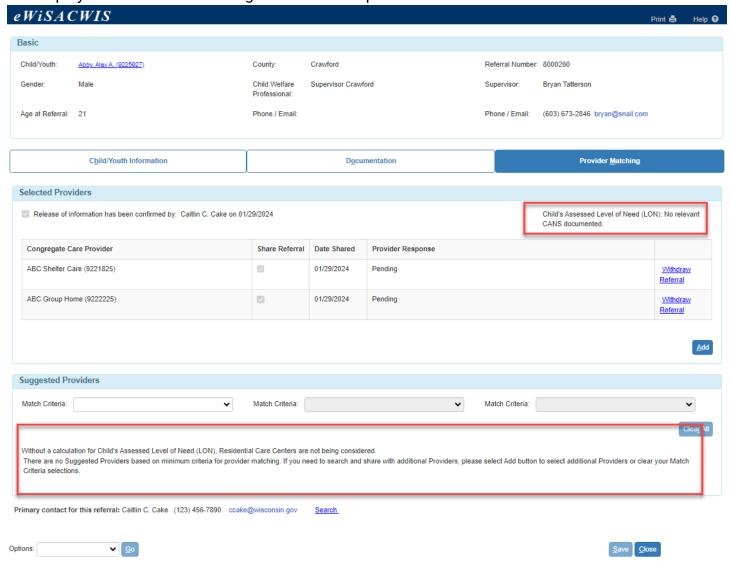
The primary contact for the referral displays at the bottom of the Provider Matching tab.



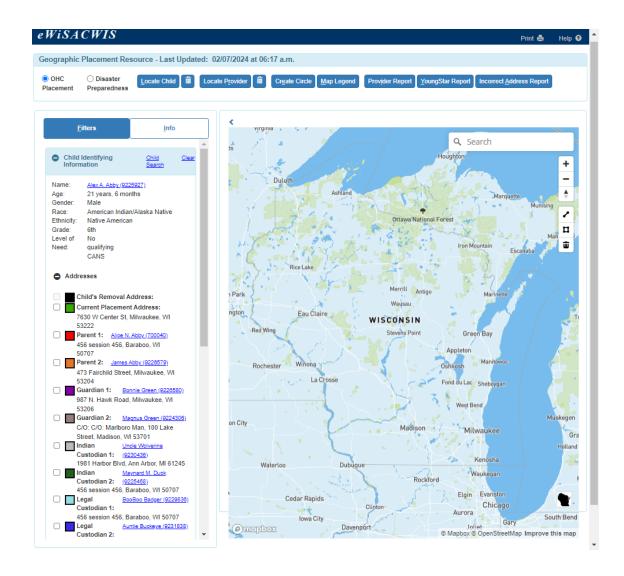
- 7. There are multiple options to choose Selected Providers to share the Congregate Care Referral with Group Providers. The first option is using the Suggested Providers group box.
  - Below the Selected Providers group box on the page, there is a Suggested Providers group box with options. The Suggested Providers are an initial pool of potential providers suggested by the system based on providers who meet specific criteria that match the child or youth including Level of Need, Operational Vacancies, gender, and location relative to the Primary Residence of the Reference Person for the case. Three providers display at a time. The providers with the highest matching points will display. The county user can use the Select hyperlink to move the Suggested Providers into the Selected Providers group box to then share the referral with Group Care Providers. If a provider is selected, the Suggested Providers group box refreshes until all potential providers are exhausted.
  - There are 3 Match Criteria drop downs in the Suggested Providers group box. Users can select values from the Match Criteria drop downs to narrow down Suggested Providers for the child or youth needing placement. These values correspond to the Other Provider Characteristics and Target Groups that are associated with Private Providers. The Suggested Providers will update based on the Match Criteria selected. The Clear All button will remove any selections in the Match Criteria and reset the displayed Suggested Providers based on the algorithm.



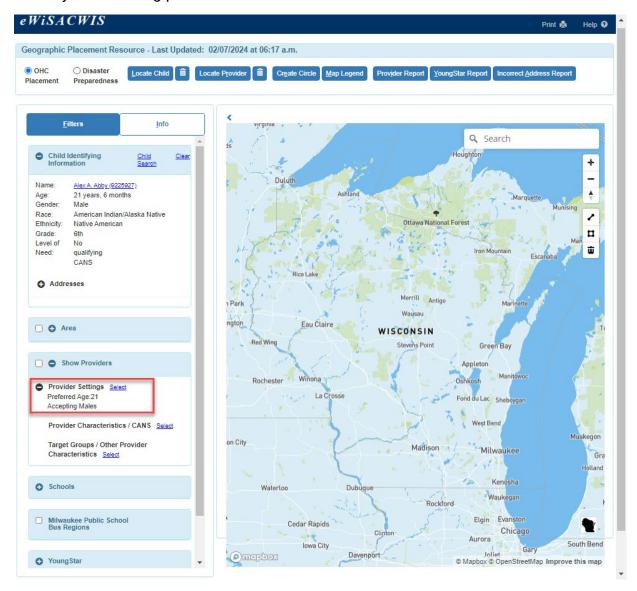
8. If there is not a relevant CANS documented, Residential Care Centers will not be considered. If there are no Suggested Providers based on the minimum criteria for provider matching, the page will display instructions for sharing with additional providers.



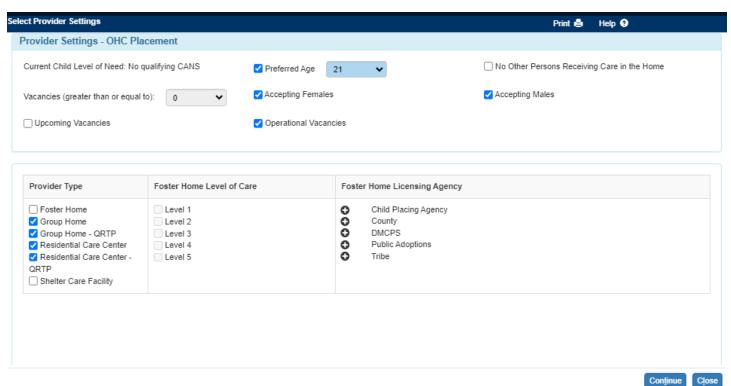
- 9. The second option for selecting providers is through the Add button. Selecting the Add button on the page, launches the Geographic Placement Resource Page in OHC Placement mode to search and pull back SYNC providers to share in the Congregate Care Referral.
  - The Geographic Placement Resource page will display with the Child Identifying Information prefilled from the child or youth identified from the Congregate Care Referral.
  - The addresses for the child or youth will also display.



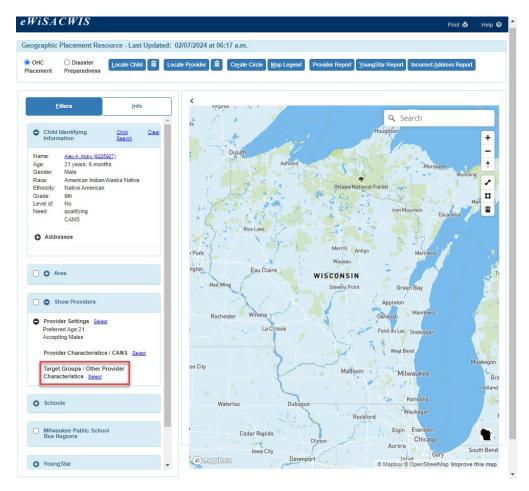
To update the map to display matching providers, navigate to the Show Providers group box.
 The user can select Provider Settings to better match Group Care Providers to the child or youth needing placement.



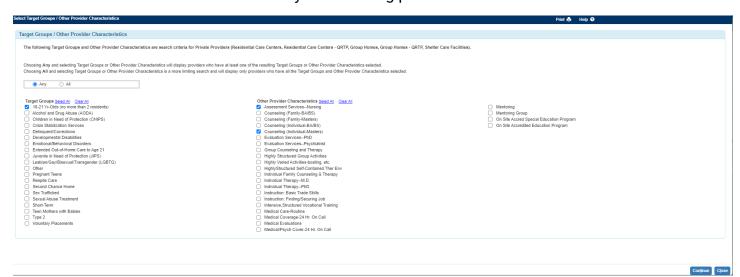
• To search for Group Care Providers, select the provider type. The Preferred Age will prefill with the selected child or youth's age from the Congregate Care Referral. Accepting Males or Accepting Females will be selected upon opening the page based on the gender of the child or youth. These checkboxes can be deselected, and the age can be changed if needed. A user can further drill down matches by selecting the Upcoming Vacancies box or the Operational Vacancies box. These boxes only became selectable when the Provider Type selected is Group Home, Group Home-QRTP, Residential Care Center, Residential Care Center-QRTP, or Shelter Care Facility.



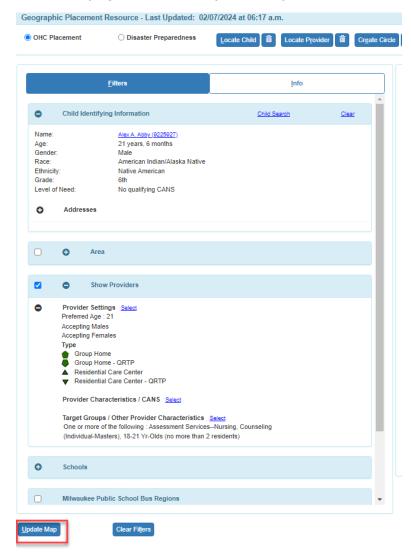
• To update the map to display matching providers based on Target Groups or Provider Characteristics, navigate to the Show Providers group box and select the Select hyperlink.



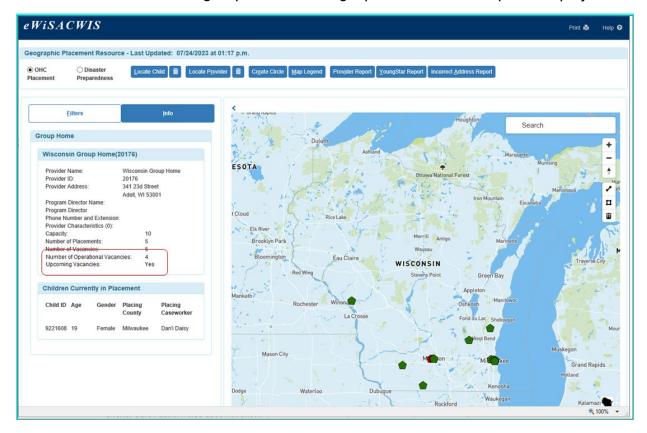
• The user can select Target Groups/Other Provider Characteristics to better match Group Care Providers to the child or youth needing placement.



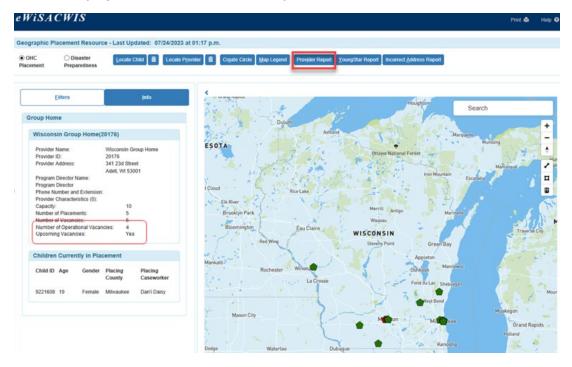
• Following the selections, select Continue to return to the Geographic Placement Resource page and select Update Map.



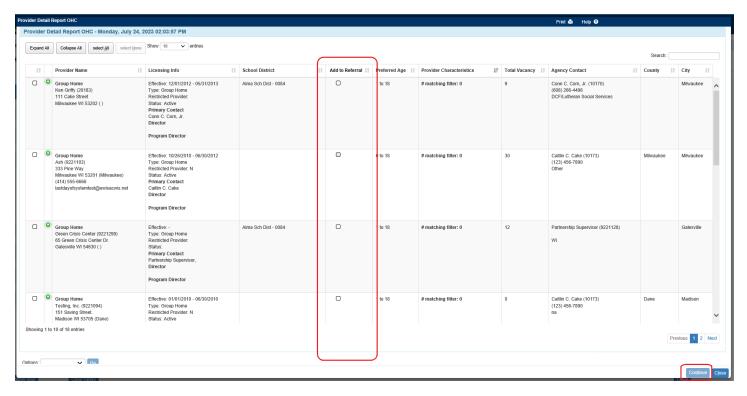
• The Map will update displaying providers on the map who meet the criteria selected in the Show Providers group box. Selecting a provider on the map will display their information.



• To select and bring providers back to share the referral on the Congregate Care Referral page, select the Provider Report button

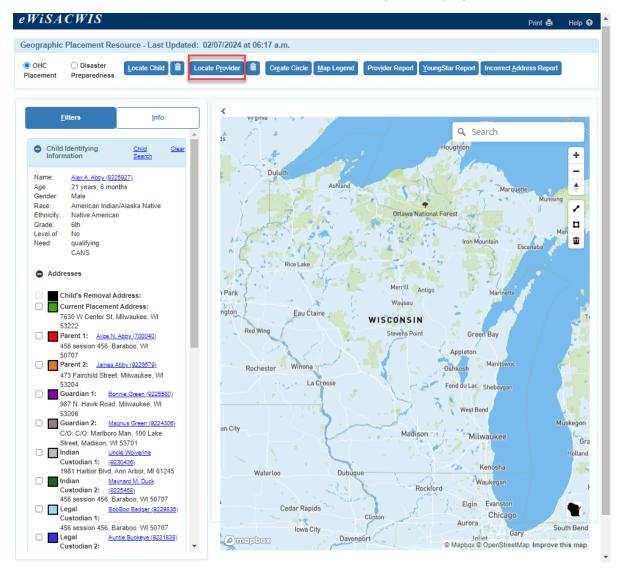


The Provider Detail Report OHC will display. There is a column titled Add to Referral. If a
provider is a SYNC Provider and can receive Congregate Care Referrals, the checkbox will
be enabled and selectable. Select the checkboxes for providers that the referral should be
shared with and then Continue.

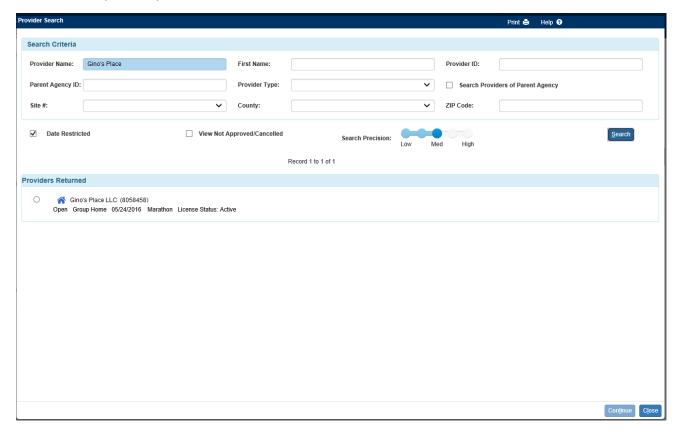


• The Provider Detail Report OHC and Geographic Resource Placement pages will close, and the user will be brought back to the Congregate Care Referral page. The page will refresh the providers selected from the GPR page will now display in the Selected Providers group box. Select the Share Referral checkbox(es) and save the page to share the referral with the providers selected in the group box.

- 10. The last way to share a referral is with an individual provider through a search process. To select and share with an individual provider, the county user uses the Geographic Placement Resource page as well. Select the Add button on the Congregate Care Referral page. The user will be taken to the Geographic Placement Resource page.
  - Select the Locate Provider button at the top of the page.

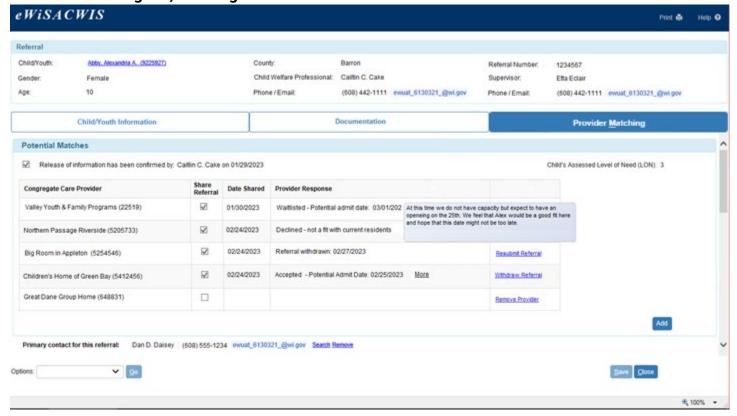


 The county user can search by provider name or ID. Selecting the radio button on the Providers Returned and the Continue button will bring back the individual provider to the Congregate Care Referral page where a county user can select the Share Referral checkbox to share with that specific provider.

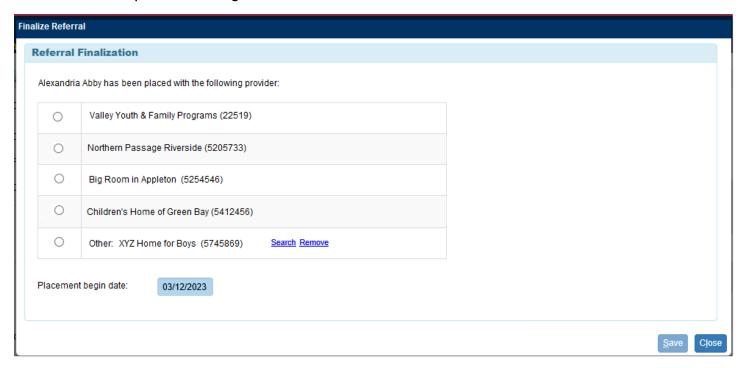


11. Back on the Provider Matching tab, Congregate Care Providers will display based on selections using the navigations listed above. Responses from Providers will display in the Provider Response group box as providers review and respond to the referrals.

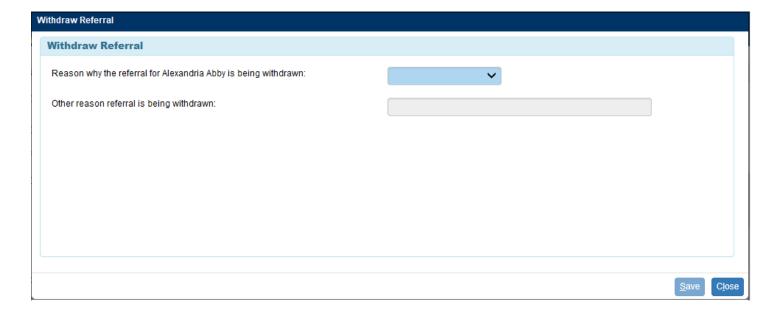
Provider Matching tab, showing the hover box when the user hovers over the 'More' flare.



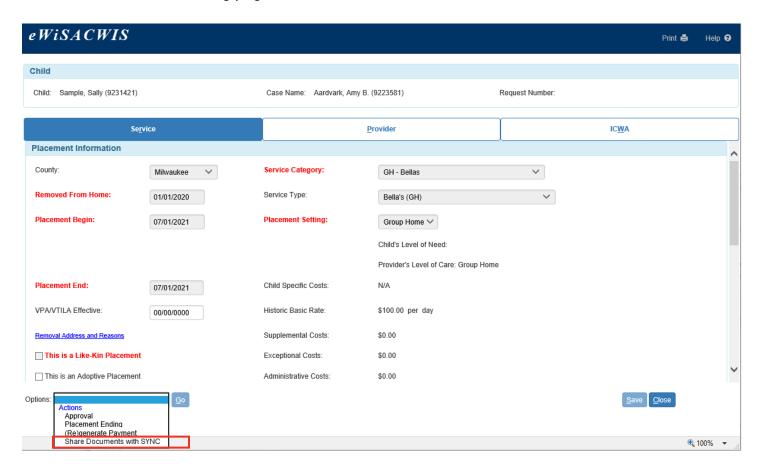
12. Finalize and freeze the referral by indicating the provider with whom the child has been placed and the date that the placement began.



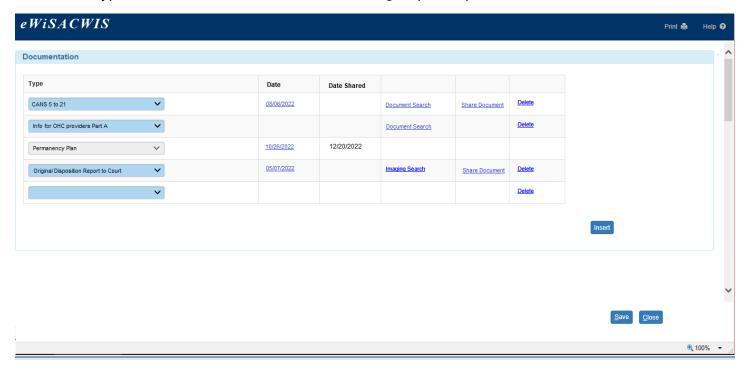
13. Withdraw the referral to withdraw and remove access to the referral for all the providers that it has been shared with. This should occur when the placement is no longer needed. Select the reason why the referral for the child is being withdrawn. Upon successful save of the page the Provider Response on the corresponding Congregate Care Referral page will be set to 'Referral withdrawn: [DATE]' for all providers shown.



14. After a referral is submitted via SYNC and the child is placed with a group care provider the child welfare professional can share documents with the group care provider from the Out-of-Home Placement page. Click the Options drop-down and select Share Documents with SYNC. Click Go to launch the Document Sharing page.



From the Document Sharing page, the child welfare professional can search for and select documentation for sharing with group care providers through SYNC. Select the document type using the dropdowns. Click Document Search to launch the Document Search page. Click Share Document hyperlink to share the document with the group care provider.

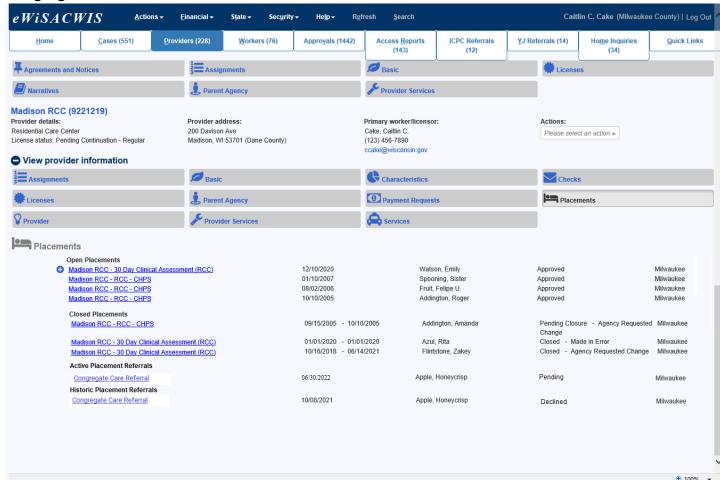


The Congregate Care Referral is housed under the Placements drop down on both the Case and Provider tabs. The referrals are child-specific and display under each case the child has been a participant of. The Congregate Rare Referral work appears under Placements on both Cases and Providers tab. The Congregate Care Referrals can be either Active or Historic.

All active referrals are displayed under Active Placement Referrals section. An active referral is a referral that has not been either Finalized or Withdrawn. All historic referrals are displayed under the Historic Placement Referrals. Historic referrals have statuses of Withdrawn and Finalized. Both Active and Historic referrals are displayed sorted by date created (descending), Child name (ascending).

When a Congregate Care Referral is displayed under the Case, the referral displays a plus toggle for each Congregate Care Referral.

## **Congregate Care Referral - Providers Tab View**



## **Congregate Care Referral - Cases Tab View**

Placements				
◆ Images (4)				
Open Placements				
Rollins, Rosie - Foster Home (Level 2+)	03/04/2020	Apple, Green	Approved	Dodge
Closed Placements				
Sweet, Kimmy - Foster Home (Level 2+)	03/02/2020 - 03/03/2020	Apple, Green	Closed - Provider Requested	Dodge
Active Placement Referrals			Change	
Congregate Care Referral	06/30/2022	Apple, Honeycrisp	Desision(s) Made	Milwaukee
*	00/30/2022	гъррю, попозопор	Decision(s) Made	Militradico
Tree Swing Youth & Family (22519) Southwest Passage Rio (5205733)	07/10/2022		Pending Accepted	
- '				
Historic Placement Referrals	40/00/2004			
Congregate Care Referral	10/08/2021	Apple, Honeycrisp	Finalized	Milwaukee
Congregate Care Referral	01/11/2021	Apple, Jonathan I.	Withdrawn	Milwaukee