

Tasks and Ticklers: Creation and Removal

This document outlines the Case Tasks/Ticklers and Provider Tasks/Ticklers that are created in eWiSACWIS to serve as reminders for Child Welfare Professionals to complete certain tasks. Information on each task/tickler is summarized in this document and provides detail on what triggers its creation, what causes it to be removed or deleted, the timing of its display and any subsequent escalation, and any other pertinent information.

Table of Contents

Case Tasks/Ticklers	2
Adoption Assistance and Subsidized Guardianship Amendments	2
Assessment.....	4
Case/Permanency Plan.....	6
Confirming Safe Environments	7
ICWA	7
Imaging	8
Inactive Case Review	8
Independent Living	9
Legal	10
Ongoing Services.....	10
Person Management	11
Placement	11
Planning.....	12
Safety.....	13
Subsidized Guardianship	13
TPR.....	15
Youth Justice	15
Provider Tasks/Tickers	16
Home Study or Home Study Update/Recert.....	16
Kinship	16
Provider	17
Provider License	17
Private Providers	18

Case Tasks/Ticklers

Adoption Assistance and Subsidized Guardianship Amendments

Task name:	1st Rqst for Documentation Not Received
Description:	This task reminds the worker that a request for documentation for an amendment (adoption assistance or subsidized guardianship) has been sent and has not been received back from the family.
Creation:	When a worker creates the Amended Agreement page with a row in the Documentation group box where the Type is "Request for Documentation Sent". This task is due 45 days after the Date for that row.
Removal:	<p>This task is removed in the following ways:</p> <ul style="list-style-type: none"> • A new row is inserted on the Amended Agreement page in the Documentation group box where the Type is "Request for Documentation Sent". • A new row is inserted on the Amended Agreement page in the Documentation group box where the Type is "Requested Information Received". • A new row is inserted on the Amended Agreement page in the Documentation group box where the Type is "Signed Amended Agreement Received" and the Date is equal to or after the earliest date documented for a row with Type of "Request for Documentation Sent". • The Amended Agreement is Not Approved.
Task name:	2nd Rqst for Documentation Not Received
Description:	This task reminds the worker that a second request for documentation for an amendment (adoption assistance or subsidized guardianship) has been sent and has not been received back from the family.
Creation:	When a second "Request for Documentation Sent" row is documented in the Documentation group box of the Amended Agreement page (i.e. at least two rows of this type are displayed on the page). This task is due 90 days after the Date for that row.
Removal:	<p>This task is removed in the following ways:</p> <ul style="list-style-type: none"> • A new row is inserted on the pending Amended Agreement page in the Documentation group box for which the Type is "Signed Amended Agreement Received" or "Requested Information Received". • OR the Amended Agreement is Not Approved.
Task name:	Expiration Reminder to Family
Description:	This task reminds the worker that the Adoption Assistance (or Subsidized Guardianship) Amended Agreement is approaching its expiration.
Creation:	This task is created when an Amended Agreement receives final approval and the Decision on the Amended Agreement is 'Approved'.
Removal:	This task is removed when the worker creates the Notification of Amended Agreement Expiration page and the Sent checkbox is selected.
Comments:	This task displays 130 days prior to the due date (12 months from the Effective Date on the Amended Agreement).

AFCARS

Task name:	AFCARS Exceptions - Adoption
Description:	This task is an indication that federal reporting elements are incomplete.
Creation:	This task is created for each child where adoption AFCARS data elements are missing, incorrect, or otherwise inconsistent with AFCARS reporting expectations. AFCARS tasks are generated nightly.
Removal:	This task is removed when the missing AFCARS data is documented on the AFCARS Errors page or other designated page. This task is not removed until all AFCARS errors that produce a task are resolved and the nightly batch process runs.
Task name:	AFCARS Exceptions – Foster Care
Description:	This task is an indication that federal reporting elements are incomplete.
Creation:	This task is created on open cases where the child is currently in placement (or was in placement previously and whose case is still open for services) and AFCARS data is missing, incorrect, or otherwise inconsistent with AFCARS reporting expectations. AFCARS tasks are generated nightly.
Removal:	This task is removed when the missing AFCARS data is documented on the AFCARS Errors page or other designated page. This task is not removed until all AFCARS errors that produce a task are resolved and the nightly batch process runs.
Comments:	This task prevents case closure. Please see the AFCARS User Guide on the Knowledge Web for more detailed information regarding specific AFCARS errors and how to correct them.

Agreements and Notices

Task name:	Voluntary Placement Agreement – Group Home
Description:	This task reminds the worker that the Voluntary Placement Agreement- Group Home is about to expire and the child needs to be placed in an alternate placement or a court order needs to be obtained.
Creation:	This task is created when the worker creates a VPA – Group Home using the Agreements and Notices page. This task is due 15 days after the 'Date of Agreement' on the Agreements and Notices page.
Removal:	This task is removed when the worker checks the Agreement Concluded checkbox and documents an "Agreement End Date" on the Agreements and Notices page.
Task name:	Voluntary Placement Agreement – Foster Home
Description:	This task reminds the worker that the Voluntary Placement Agreement- Foster Home is about to expire and the child needs to be placed in an alternate placement or a court order needs to be obtained.
Creation:	This task is created when the worker creates a VPA – Foster Home using the Agreements and Notices page. This task is due 180 days after the 'Date of Agreement' on the Agreements and Notices page.
Removal:	This task is removed when the worker checks the Agreement Concluded checkbox and documents an "Agreement End Date" on the Agreements and Notices page.

Assessment

Task name:	Initial Assessment Due
Description:	This task reminds the worker than an Assessment must be completed for a screened in CPS Report Access Report.
Creation:	This task is created when the CPS Report Access Report is linked to an existing case or used to create a case.
Removal:	This task is removed when the assessment has received supervisory approval.
Task name:	Assessment Extension
Description:	This task reminds the worker to complete the assessment by the Extension Completion date in the Time Frame (dates) group box on the Extension page (via the Basic tab of the Assessment page).
Creation:	This task is created when an assessment extension receives supervisory approval.
Removal:	This task is removed when the assessment has received supervisory approval.
Task name:	Create Notice of Right to Review
Description:	This task reminds the Maltreater Review Coordinator (or if no CAPTA Maltreater Review Coordinator has been identified for the assessment then the primary worker) to create the Notification of Initial Determination of Child Abuse and/or Neglect and Right to Request a Review letter for a substantiated maltreater.
Creation:	This task is created for each maltreater upon supervisory approval of a substantiated assessment, and an escalated task is created for worker's supervisor.
Removal:	This task is removed in the following ways: <ul style="list-style-type: none"> The Notification of Initial Determination of Child Abuse and/or Neglect and Right to Request a Review letter is created and the 'Sent' checkbox is selected, By a supervisor via Task Management if the maltreater has a documented Death Date on the Person record.
Comments:	This task prevents case closure.
Task name:	Maltreater Review No Response Letter Due
Description:	This task reminds the Maltreater Review Coordinator (or if no CAPTA Maltreater Review Coordinator has been identified for the assessment then the primary worker) to send the Notice of Final Determination of Child Abuse and/or Neglect and Right to Request an Appeal letter when no response has been received from the maltreater by the response due date.
Creation:	This task is created for any maltreater that has not requested a review and where the response due date has passed. This task is due 5 days after the response due date. A task is created for each individual maltreater.
Removal:	This task is removed in the following ways: <ul style="list-style-type: none"> The Notice of Final Determination of Child Abuse and/or Neglect and Right to Request an Appeal letter is created and the 'Sent' checkbox is selected OR a Response Received date is documented on the Reviews tab for the maltreater. By a supervisor via Task Management if the maltreater has a documented Death Date on the Person record.
Comments:	This task prevents case closure.

Task name:	Maltreatment Review Determination Due
Description:	This task reminds the Maltreater Review Coordinator (or if no CAPTA Maltreater Review Coordinator has been identified for the assessment then the primary worker) that a final determination for a Review and Notice of Final Determination and Right to Request an Appeal letter are due.
Creation:	This task is generated upon creation of a Review and is due 45 days from the date the maltreater requested the review. This task is created for each individual maltreater.
Removal:	This task is removed in the following ways: <ul style="list-style-type: none"> • The Review receives supervisory approval • The Review is marked as 'Not Approved' • By a supervisor via Task Management (if the maltreater has a documented Death Date)
Comments:	This task prevents case closure.
Task name:	90-Day Summary Report for Serious Incident
Description:	This task reminds the worker to complete a 90-day summary report & send it to the Division of Safety and Permanence (DSP) when DSP finds the incident qualifies as an incident of child death, serious injury, egregious incident, or suspected suicide in OHC.
Creation:	This task is created when the DSP worker selects "Yes" for Serious Incident on the Allegation (Access) or Allegation (Assessment) page and saves the Serious Incident Notification page This task is due 60 days from the date the DSP worker selects "Yes" to the serious incident and saves the Serious Incident Notification page.
Removal:	This task is removed when the 90-day summary report is created via the Notices History page and the 'Sent' checkbox is selected.
Comments:	This task prevents case closure.
Task name:	Tribal Collaboration
Description:	To improve collaboration and compliance between Tribes and Counties.
Creation:	The task is created on save of the Assessment with one or more participants identified as child/youth and tribal status of Pending, Eligible for Membership, or Member.
Removal:	Final approval of the Assessment.
Comments:	Sent 45 days before due date and escalated 15 days before due date.

Case/Permanency Plan

Task name:	Case Plan Due – 60 Days
Description:	This task reminds the worker to complete a Case Plan 60 days after an approved Initial Assessment or Safety Assessment, Analysis and Plan.
Creation:	This task is created when there is no other 'Case Plan Due' task due in the next 60 days and one of the following occurs: <ul style="list-style-type: none"> Approval of a Safety Assessment, Analysis and Plan with a Final Safety Decision of "Unsafe" Approval of an Initial Assessment with a Safety Assessment Safety Decision of "Unsafe" Approval of an Initial Assessment
Removal:	This task is removed in the following ways: <ul style="list-style-type: none"> A Case/Permanency Plan is approved. Upon final approval of a child's removal from out of home placement record, given all other active case participants with a 'CW' or 'CPS' person type are already in an open placement. This task should not be deleted if there are other case participants with a 'CW' or 'CPS' person type that are not in an open placement.
Task name:	Case Plan Due – 120 Days
Description:	This task reminds the worker to complete a Case Plan 120 days after a screened in Services Report.
Creation:	This task is created upon linking a screened in Child Welfare type of Services Report to an existing case (or creating a new case) for the access participants identified as an 'Identified Child.'
Removal:	This task is removed when a Case/Permanency Plan is approved.
Task name:	Case Plan Due – 6 Months
Description:	This task reminds the worker to complete a Case Plan 6 months from the previous Case Plan, based on the 'Plan Date' of the plan. This task is due 180 days from the Plan Date of the most recent Case Plan.
Creation:	This task is created upon final approval of a Case/Permanency Plan of type 'Case Plan'.
Removal:	This task is removed in the following ways: <ul style="list-style-type: none"> A Case/Permanency Plan is approved. By a supervisor via Task Management.
Task name:	Permanency Plan Due
Description:	This task reminds the worker to complete a Permanency Plan within 60 days of the child's initial placement date.
Creation:	This task is created when an Out of Home Placement is a removal from home placement.
Removal:	This task is removed when a Case/Permanency Plan is approved, except when the Plan Date of the approved Case/Permanency Plan is prior to the creation date of this task.
Task name:	Permanency Review (6 Month)
Description:	This task reminds the worker to complete a Permanency Plan Review within 6 months of the removal from home date and every 6 months thereafter, as long as the child remains in out of home care.
Creation:	This task is created every 6 months from the Hearing/Review Date documented on the Permanency Plan Review or Hearing Result page.
Removal:	This task is removed when a Permanency Review (6 month) or Permanency Hearing (12 month) is created and approved on the Permanency Review or Hearing Result page.
Task name:	Permanency Hearing (Annual)
Description:	This task reminds the worker to complete a Permanency Plan Hearing within one year of the removal from home date and every year

	thereafter, as long as the child remains in out of home care.
<i>Creation:</i>	The initial Permanency Plan Hearing task is generated when a removal from home Out of Home Placement is created. For every consecutive Permanency Plan Hearing task, the due date is calculated 12 months from the 'Date of Hearing/Review' on the Permanency Plan Review or Hearing Results page.
<i>Removal:</i>	This task is removed when a Permanency Plan Hearing (12 month) is approved on the Permanency Plan Review or Hearing Results page.

Confirming Safe Environments

<i>Task name:</i>	Confirming Safe Environments Due
<i>Description:</i>	This task reminds the worker to complete a Confirming Safe Environments (CSE) within 10 days of the Out of Home Placement.
<i>Creation:</i>	This task is created when an Out of Home Placement is created.
<i>Removal:</i>	This task is removed upon final approval of a CSE or upon final approval of a placement ending that is less than 10 days.
<i>Task name:</i>	Reconfirming Safe Environments Due
<i>Description:</i>	This task reminds the worker to complete a Reconfirming Safe Environments record within 180 days from the date of approval for the previous CSE/RCSE.
<i>Creation:</i>	This task is created when a CSE/RCSE is approved and the placement remains open.
<i>Removal:</i>	This task is removed in the following ways: <ul style="list-style-type: none"> • A Reconfirming Safe Environments is approved. • By a supervisor via Task Management.

ICWA

<i>Task name:</i>	Update Pending Tribal Membership Status
<i>Description:</i>	This task reminds the worker that a child on the case who is in an Out of Home Placement and has an Ongoing Permanency Plan has a tribal membership status of pending that needs to be updated.
<i>Creation:</i>	This task is created on approval of a Permanency Plan if the child's tribal membership status is pending. This task is due 30 days from approval of the Permanency Plan.
<i>Removal:</i>	This task is removed in the following ways: <ul style="list-style-type: none"> • When both the Status 1 and Status 2 are something other than "Pending". • By a supervisor via Task Management.
<i>Task name:</i>	Create ICWA Record
<i>Description:</i>	This task reminds the worker that an ICWA record needs to be created for every child who is placed in Out of Home care.
<i>Creation:</i>	This task is created when an Out-of-Home placement is final approved for a child and the following is true: <ul style="list-style-type: none"> ▪ The child who was placed does not have an ICWA Record in eWiSACWIS. ▪ An ICWA Record task/tickler does not already exist for the same child. This task is due 30 days after the Out of Home Placement Begin Date.
<i>Removal:</i>	This task is removed in the following ways: <ul style="list-style-type: none"> • When an ICWS record is created and saved for the child. • By a supervisor via Task Management.

Imaging

Task name:	Child/Youth Photograph – 30 Day
Description:	This task reminds the worker that a photograph must be added within 30 days of a removal from home Out of Home Placement.
Creation:	This task is created for a child with a removal from home Out of Home Placement.
Removal:	<p>This task is removed in the following ways:</p> <ul style="list-style-type: none"> Attaching an image of type “Child/Youth Photo” to the person through Create Case Work, Imaging Search, or Person Management By a supervisor via Task Management.
Task name:	Child/Youth Photograph – 6 Month
Description:	This task is created to remind workers that a new photograph must be scanned in to eWiSACWIS every 6 months for all children in Out of Home Placements.
Creation:	This task is generated initially from final approval of an Out of Home Placement. This task is deleted and a new 6 month task is created every time a Child/Youth Photograph is attached to the person record.
Removal:	<p>This task is removed in the following ways:</p> <ul style="list-style-type: none"> Attaching an image of type “Child/Youth Photo” to the person through Create Case Work, Imaging Search, or Person Management. By a supervisor via Task Management.

Inactive Case Review

Task name:	Inactive Case Review
Description:	This task highlight cases for supervisors that should likely be closed or followed up on
Creation:	<p>If any of the following are true:</p> <ul style="list-style-type: none"> The case has been open for 81 or more days and has never had a documented face to face contact The case has not had a face-to-face contact documented in 81 or more days The case has been open for 81 or more days and has never had approved casework. Approved casework is any supervisor-approved piece of work in eWiSACWIS, excluding financial transactions The case has not had approved casework in 184 days or more (6 months).
Removal:	<p>A face-to-face contact or piece of work is created and approved such that the criteria above no longer apply or the case is closed.</p> <p>Note: This task cannot be deleted via Home tab (trash can icon)</p>

Independent Living

Task name:	IL Assessment and IL Plan
Description:	This task is created for children in placements that have been in care for any 6 months after the age of 14 to begin Independent Living Services. This task notifies the worker that they have 90 days to complete the Independent Living Assessment and the Independent Living Plan.
Creation:	This task is created when an Out of Home Placement exists for a child and the child has been in care for any 6 months after the age of 14.
Removal:	This task is removed when both the Independent Living Assessment Completed and Independent Living Plan Completed dates are documented on the Independent Living page.
Task name:	IL Transition to Discharge Plan
Description:	This task is created for youth in AFCARS placements at the age 17 ½. This task notifies workers that they have 90 days to complete the Independent Living Transition to Discharge Plan.
Creation:	This task is generated upon the creation of an AFCARS qualifying Out of Home Placement.
Removal:	This task is removed once a 'Independent Living Transition to Discharge Plan Completed' date is documented on the Assessment/Plan tab of the Independent Living page.
Comments:	If overdue, this task prevents the approval of a Permanency Plan. This task prevents case closure and cannot be deleted by a supervisor via Task Management.
Task name:	NYTD 17 Survey
Description:	This task is created for youth in placement at their 17 th birthday, or if youth are placed into out of home care any time after their 17 th birthday. This task notifies the worker that they have 45 days after the youth's 17 th birthday to complete the NYTD survey accessed via the Outcomes tab on the Independent Living page.
Creation:	Created when an AFCARS qualifying Out of Home Placement is approved and another NYTD task does not already exist. This task is created if a child enters out of home care after the age of 17. If the Begin Date of the Out of Home Placement is beyond 45 days from the youth's 17 th birthday, this task is not created.
Removal:	This task is removed in the following ways: <ul style="list-style-type: none"> Once a 17 year old NYTD survey is loaded into eWiSACWIS from the survey tool; When a worker selects the 'Youth did not complete the survey' checkbox with an associated reason on the Outcomes tab of the Independent Living page;
Task name:	Schedule ILTD Meeting
Description:	This task is created to remind worker that they should schedule at least one Independent Living transition meeting prior to the youth's 18 th birthday.
Creation:	A task is created for a youth in an AFCARS qualifying Out of Home Placement that has been in care for any 6 months after the age of 14 to begin IL Services. This task displays 180 days prior to the youth's 18th birthday. The due date is 90 days after the youth became eligible for Independent Living services.
Removal:	This task is removed in the following ways: <ul style="list-style-type: none"> When a new meeting is inserted on the IL page – ILTD tab in the "Transition Meetings" group box. By a supervisor via Task Management.
Comments:	The Independent Living page is youth specific and is displayed under all of the child's cases, however only one task is created for the youth and is linked to the case where the youth's Out of Home Placement exists.

Legal

Task name:	Report to the Court Due
Description:	This task reminds the worker to complete a court ordered study
Creation:	This task is created when there is a Court Report Due date on the Legal Status page and the Verified? checkbox is checked.
Removal:	This task is removed when the Report Submitted date is documented on the Legal Status page.

Ongoing Services

Task name:	Intensive In-Home
Description:	This task informs the worker that the Intensive In-Home Services for the case are ending in 30 days. The purpose of this task is to allow the worker to determine and secure an extension, if applicable, prior to the actual end date.
Creation:	This task is created when the program Designation on the Maintain Case page = Intensive In-Home and the Extended checkbox is not checked on the Program page. It is also created when the primary assignment's type and responsibility are Intensive In Home.
Removal:	<p>This task is removed in the following ways:</p> <ul style="list-style-type: none">• When the Extended checkbox is selected.• When the program designation on the Program page is no longer 'Intensive In-Home.'• When the last remaining case participant with 'Rsp' checkbox checked who is also selected as a participant on the Program page is deactivated or removed.• When the primary assignment to the case with a Type other than 'Intensive In-Home' is created.• When a new Intensive In-Home Service Ending task is created.• When an Out of Home Placement is documented for a child selected as a participant on the Program page.

Person Management

Task name:	Review Adoption/Guardianship History
Description:	This task is an indication that this section of the basic tab from person management has not been fully completed for any minors in out of home care.
Creation:	This task is created when an initial Out of Home Placement is created for a child under 18 and child has an adoption history or guardianship history record with a value of 'Unable to Determine'. This task is due 60 days after the Out of Home Placement is created.
Removal:	This task is removed in the following ways: <ul style="list-style-type: none"> When the adoption history and guardianship history have a value other than 'Unable to Determine'. By a supervisor via Task Management.
Comments:	This task prevents case closure. Please see the AFCARS User Guide on the Knowledge Web for more detailed information regarding specific AFCARS errors and how to correct them.
Task name:	Health Screen Due
Description:	This task reminds the worker to document required Health Screen information in counties that participate in the Care4Kids Program.
Creation:	This task is created upon final approval of a placement if the county documenting the placement is listed as an active Care4Kids County, the Out of Home Placement is a removal from home placement, and there is no existing health concern record of type Health Screen/CPC Health Screen with an appointment date or exemption date within 3 days before or after the removal date on the placement.
Removal:	This task is removed in the following ways: <ul style="list-style-type: none"> When a health concern of type Health Screen/CPC Health Screen is documented with an exemption or appointment date after the removal date and prior to the discharge date. By a supervisor via Task Management.
Task name:	Update Expecting Youth Information
Description:	This task reminds the worker that the Anticipated Due Date has passed for an active child participant on an open case where the child is identified as an expecting youth and the information needs to be updated on Person Management.
Creation:	This task is created when the child's person record is saved where an Anticipated Due Date is entered, the Anticipated Due Date is changed to a different date, or worker checks the Unknown checkbox.
Removal:	This task is removed after the worker unchecks the Expecting Youth checkbox and saves the person record.

Placement

Task name:	Re-evaluate Interim Care – Due 30 Days
Description:	This task reminds the worker to end the 'Interim Care' Out of Home Placement after the end of the 12 th month from the termination of the specified child's subsidized guardianship agreement.
Creation:	This task is created upon final approval of an 'Interim Care' Out of Home Placement.
Removal:	This task is deleted when the placement ending for the 'Interim Care' Out of Home Placement is approved.
Task name:	Assessment when No Longer Missing
Description:	This task reminds the worker to complete the Assessment when a Child or Youth is no Longer Missing within 5 days of the child returning to Out-of-Home Care.
Creation:	When a Missing from Out-of-Home Care placement is ended for a reason other than "Missing from OHC – Closing Case".
Removal:	This task is deleted when an Assessment When a Child or Juvenile is No Longer Missing page is approved for this child.

Task name:	QRTP Court Order
Description:	To remind the worker to document Court Order on the Imaging page for the child in QRTP placement.
Creation:	Created when a child has been placed in QRTP certified placement.
Removal:	This task is removed when the QRTP court order is documented on the Imaging page (using the QRTP Court Orders options).
Task name:	Reminder to obtain Authorization for Extended Placement in QRTP with {Provider Name (Provider ID)}.
Description:	Reminds worker to obtain Authorization for Extended Placement in a QRTP
Creation:	Created for a case when: a child aged 13 or older has a(n) (open) QRTP placement that is approaching either 18-month or 12-month threshold; OR child is under the age of 13 and has been placed in a QRTP setting for almost 6 months.
Removal:	This task is removed in the following ways: <ul style="list-style-type: none"> • When Authorization form for the child/provider combination is documented • By a supervisor via Task Management. • Manually via Upcoming and Overdue Tasks dashboard > Trash can icon.

Planning

Task name:	30-Day CANS
Description:	This task is to remind the worker to complete an Out of Home CANS within 30 days of a new placement.
Creation:	This task is created upon final approval of an Out of Home Placement, if there is no outstanding 30-Day CANS task for the child from a previous placement; or, upon final approval of an Out of Home CANS for a previous placement and an outstanding 30-day task was deleted.
Removal:	This task is removed upon final approval of an Out of Home CANS
Task name:	3-Month CANS
Description:	This task is to remind the worker to complete a subsequent Out of Home CANS within 6 months of a previous Out of Home CANS.
Creation:	This task is created upon final approval of an Out of Home CANS if the Out of Home Placement is still open. This task is due 180 days from the Effective Date of the most recent Out of Home CANS.
Removal:	This task is removed upon final approval of an Out of Home CANS for the child's current open placement.
Task name:	ASFA Exceptions
Description:	This task reminds the worker to complete the ASFA Exceptions page at the 15 th month when the child has reached the 15/22 month out of home.
Creation:	This task is created upon creating or ending an Out of Home Placement.
Removal:	This task is removed in the following ways: <ul style="list-style-type: none"> • When a Permanency Plan - ASFA Exceptions page is created and approved OR • When a TPR filed date is documented on the Legal Action page (for Legal Actions of Request for TPR, TPR Petition Involuntary, and TPR Petition Voluntary) OR

Safety

Task name:	SAAP Due – Change in Circumstances
Description:	This task is to remind the worker to complete a new Safety Assessment Analysis and Plan within 30 days of the birth of a child.
Creation:	<p>This task is created at the time the child's Birth Date is documented and the 'This is an Unborn child' checkbox is unchecked, with the following additional rules:</p> <ul style="list-style-type: none"> • Created only if there is no other SAAP Due task due in the next 30 days. • If the Birth Date is equal to or after the case Open/Reopen date for any open case on which the child is an active case participant. • If the Birth Date is earlier than the case Open/Reopen date for any open case which the child is an active participant then no task is created for that case.
Removal:	This task is removed upon approval of the SAAP where the child is listed as one of the Child Participants.
Comments:	This task appears as an escalated task to the primary worker's supervisor 10 days prior to the due date. This task prevents case closure.

Subsidized Guardianship

Task name:	2nd SG Request – Info to Determine Continued Eligibility
Description:	This task reminds the worker to resend the Annual Subsidized Guardianship Eligibility Determination to the family.
Creation:	<p>This task is created if the child has:</p> <ul style="list-style-type: none"> • An open Subsidized Guardianship service and • A Legal Status record where New Legal Status = Guard. to Relative/Caretaker (48.977) and • An approved Subsidized Guardianship Eligibility Determination <u>does not</u> exist where the day and month of Effective Date is within 90 days of the day and month Hearing Legal Status Date. <p>This task displays 40 days prior to the annual review due date (anniversary of the Legal Record Hearing/Legal Status Date) and is escalated 30 days prior to the annual review due date.</p>
Removal:	<p>This task is removed in the following ways:</p> <ul style="list-style-type: none"> • Create the 2nd SG Request for Information to Determine Continued Eligibility from the AA/SG Eligibility Notices and Decisions page. • Create the 2nd SG Request for Information to Determine Continued Eligibility from the Notices and Decisions Template History tab of the Subsidized Guardianship Eligibility page. • The Annual Review is approved. • The Subsidized Guardianship Eligibility is terminated.
Task name:	Annual SG Eligibility Determination
Description:	This task reminds the worker to complete the Annual Review of Subsidized Guardianship Eligibility Determination in the system.
Creation:	<p>This task is created if the child has:</p> <ul style="list-style-type: none"> • An open Subsidized Guardianship service and • A Legal Status record where New Legal Status = Guard. To Relative/Caretaker (48.977) and • An approved SG eligibility determination where Type = Annual Review DOES NOT exist where the day and month of Effective Date is within 90 days of the day and month Hearing Legal Status Date. <p>This task displays 70 days prior to the Hearing/Legal Status Date on the Legal Record).</p>
Removal:	<p>This task is removed in the following ways:</p> <ul style="list-style-type: none"> • An Annual Review is approved. • OR the Subsidized Guardianship Eligibility is terminated.

Task name:	SG Eligibility Termination at 18
Description:	This task reminds the worker to send the form (Advance Notice of Termination of Subsidized Guardianship At Age 18) to the SG guardian prior to the child's 18 th birthday.
Creation:	This task is created if the child has an open SG Service and the child is turning 18. This task displays 130 days prior to the child's 18 th birthday.
Removal:	<p>This task is removed in the following ways:</p> <ul style="list-style-type: none"> • Create the Advance Notice of Termination of Subsidized Guardianship at Age 18 from the AA/SG Eligibility Notices and Decisions page. • Create the Advance Notice of Termination of Subsidized Guardianship at Age 18 from the Notices and Decisions Template History tab of the Subsidized Guardianship Eligibility page. • By a supervisor via Task Management.

Task name:	SG Eligibility Termination at 19
Description:	This task reminds the worker to send the form (Request for Continuation for SG for a Child Over Age 19) to the SG guardian prior to the child's 19 th birthday.
Creation:	<p>This task is created if the child has:</p> <ul style="list-style-type: none"> • An open SG service and • Child is turning 19 in 130 days AND • Anticipated High School Graduation tab on the Education tab of the Person Management is either null or is greater than the child's 19th birthday. <p>This task displays 130 days prior to the child's 19th birthday.</p>
Removal:	<p>This task is removed in the following ways:</p> <ul style="list-style-type: none"> • Create the Request for Continuation for SG for a Child Over Age 19 from the AA/SG Eligibility Notices and Decisions page. • Create the Request for Continuation for SG for a Child Over Age 19 from the Notices and Decisions Template History tab of the Subsidized Guardianship Eligibility page. • The Subsidized Guardianship Eligibility is terminated. • By a supervisor via Task Management.
Task name:	SG Suspension or Termination
Description:	This task reminds the worker to send the form (Notification of Subsidized Guardianship Suspension or Termination) to the SG guardian when the SG payments are either suspended or terminated.
Creation:	This task is created if the child has an open SG Service and the most recent SG Eligibility Determination with the status of either "Suspend Payment" or "Terminate". This task is due 30 days from the approval date of the SG Determination with the status of "Suspend Payment" or "Terminate".
Removal:	<p>This task is removed in the following ways:</p> <ul style="list-style-type: none"> • Create the Notification of Subsidized Guardianship Suspension or Termination from the AA/SG Eligibility Notices and Decisions page. • Create the Notification of Subsidized Guardianship Suspension or Termination from the Notices and Decisions Template History tab of the Subsidized Guardianship Eligibility page. • The Subsidized Guardianship Eligibility is terminated. • By a supervisor via Task Management.

TPR

Task name:	Adoption Case Plan
Description:	This task is to remind the worker to create the Adoption Case Plan within 30 days of the TPR.
Creation:	This task is created when the date of the TPR being granted/approved by the courts is documented (starts when child is deactivated from the case for TPR).
Removal:	This task is deleted once the first Adoption Case Plan is completed and has received supervisory approval.
Task name:	Review Option to Return Custody to County
Description:	This task is to remind the worker that the order for adoption has not been completed within 2 years of the TPR.
Creation:	This task is created when the date TPR was approved by the courts is documented (starts when child is deactivated from the case for TPR).
Removal:	This task is removed when the Out of Home Placement ends for reason of 'Transfer to [County].' If custody does not transfer, This task is only removed when the case is closed.

Youth Justice

Task name:	DRAI
Description:	To remind the worker who created the DRAI to complete the piece of work.
Creation:	Upon creation of any Detention Risk Assessment Instrument (DRAI) page.
Removal:	Removed when the 'Completed' check box on the DRAI is checked.
Task name:	YJ Case Information Due
Description:	This task reminds the worker to complete a Youth Justice Case Information within 40 days of the YJ referral.
Creation:	This task is created upon accepting a YJ Referral and linking it to a case or every time changing a final decision from Yes to No and successfully saving the Youth Justice Case Information page.
Removal:	This task is removed when the "Final Decision" question is answered Yes and the "Decision" is not null on the Youth Justice Case Information page.
Task name:	YJ Supervision About to Expire
Description:	This task reminds the worker that Youth Justice Referral Information is about to expire.
Creation:	This task is created upon documenting the "Expiration Date" or "Extended Expiration Date" on the Youth Justice Case Information page.
Removal:	This task is removed in the following ways: <ul style="list-style-type: none"> For counties that are Opt-out: Upon checking the "Completed" checkbox on the Youth Justice Case Information page. For counties that are Opt-in: Upon documenting the "Date County Supervision Ended" on the Youth Justice Case Information page.
Task name:	YJ DPA About to Expire
Description:	This task reminds the worker that the Deferred Prosecution Agreement is about to expire.
Creation:	This task is created upon documenting either the number of months or date in the 'Case held open for [#] months or until [Date]' statement or the 'Extended Expiration Date' in the Obligations group box on the Deferred Prosecution page.
Removal:	This task is removed in the following ways: <ul style="list-style-type: none"> For counties that are Opt-out: This task is removed upon checking the "Completed" checkbox located in the Youth Justice Case Information page. For counties that are Opt-in: This task is removed upon documenting the "Date County Supervision Ended" on the Youth Justice Case Information page.

Provider Tasks/Tickers

Home Study or Home Study Update/Recert

Task name:	Home Study Status On Hold
Description:	This task reminds a worker who puts a Home Study Update/Recertification On Hold to remove the hold after six months.
Creation:	The Home Study Status on Hold task is created when a Home Study Update/Recertification has been placed On Hold.
Removal:	This task is removed when the Home Study Recert Hold Status page is changed from Place on Hold to Remove from Hold.

Kinship

Task name:	Kinship Eligibility Determination Due
Description:	This task reminds the worker that there is a pending initial Kinship Eligibility Determination that requires approval.
Creation:	This task is created when a pending Kinship Eligibility Determination has not been approved 30 days after the Date Completed Application Received date. This task is due 45 days from the user entered Date Completed Application Received.
Removal:	This task is removed when the Kinship Eligibility Determination has either been approved or has been marked as Made in Error. The task can also be removed via Tickler Management or via the trash can icon on the task.
Task name:	Eligibility Review
Description:	This task reminds the worker that a Kinship Eligibility Redetermination with the type of 'Eligibility Review' is due.
Creation:	This task is created when a pending Eligibility Review has not been approved within 15 days of the due date. This task is due 365 days from either the Decision Date or the Next Eligibility Review Due Date. A reminder tickler is created 15 days prior to the due date
Removal:	This task is removed when the Eligibility Review has either been approved or has been marked as Made in Error. The task is also removed if a foster care license is issued for the provider. The task can also be removed via Tickler Management or via the trash can icon on the task.
Task name:	1st KC Request to Determine Eligibility
Description:	This task reminds the worker to send the Kinship Eligibility Redetermination information for an Eligibility Review to the provider.
Creation:	This task is created for providers with open Kinship placement(s) and/or service(s) where an Eligibility Review is due. This task is due 60 days prior to the Eligibility Review due date.
Removal:	This task is removed when the 1 st KC Request to Determine Eligibility notice has been created and saved on the Eligibility Forms tab of the Kinship Eligibility Redetermination page. The task is also removed if there is a change in Kinship type, if the Eligibility Review is marked as Made in Error, or if the Eligibility Review is approved. The task can also be removed via Tickler Management or via the trash can icon on the task.
Task name:	2nd KC Request to Determine Eligibility
Description:	This task reminds the worker to resend the Kinship Eligibility Redetermination information for an Eligibility Review to the provider if they have not yet received the information back from the provider.
Creation:	This task is created for providers with open Kinship placement(s) and/or service(s) where an Eligibility Review is due. This task is due 30 days prior to the Eligibility Review due date.
Removal:	This task is removed when the 2 nd KC Request to Determine Eligibility notice has been created and saved on the Eligibility Forms tab of the Kinship Eligibility Redetermination page. The task is also removed if there is a change in Kinship type, if the Eligibility Review is marked as Made in Error, or if the Eligibility Review is approved. The task can also be removed via Tickler Management or via the trash can icon on the task.

Provider

Task name:	Inactive Duplicate Provider
Description:	Displays for the duplicate provider using dup provider name and ID and counts down immediately- Due in 14 days down to 0 days with no escalation.
Creation:	This task is created when the Send Reminder checkbox is selected for the duplicate provider on the Home Provider page.
Removal:	This task is removed when the Completed checkbox is selected for the duplicate provider on the Home Provider page.
Task name:	Review Provider EFT Information
Description:	This task reminds the worker to check the payment method after a pre-note has been sent.
Creation:	This task is created by the eWiSACWIS to DOA- EFT File Extract batch program for each pre-note sent for the provider's Designated County.
Removal:	This task is removed when the Out of Home Care worker from the designated County changes the Payment Method to EFT or requests another pre-note or resets the EFT Information on the Electronic Funds Transfer page.
Comments:	This task would only be used by a county utilizing EFT for provider payments. The Due Date, Reminder Date and Escalation Dates cannot be modified if the county is not using the EFT functionality.

Provider License

Task name:	License About To Expire
Description:	This task reminds the worker that the foster home or treatment foster home license is about to expire.
Creation:	This task is created when a home provider license is created.
Removal:	This task is removed when the status of the license is changed to Renewed, Revoked, Closed or Expired.
Task name:	DOJ Background Check About To Expire
Description:	This task is to remind workers to complete DOJ background checks for Parent 1 and Parent 2, and anyone with the role of Licensee.
Creation:	<p>This task is created when worker completes a licensing activity application with Decision = Create License (except for Out of State licenses) and a DOJ Background Check doesn't exist where the Effective To date on the Background Check is today or a future date.</p> <p>If a DOJ background check exists, the task is created 30 days before the due date of the next background check; i.e. the next background check due date is based on the Effective From date of the license plus 4 years.</p>
Removal:	This task is removed when a background check of type DOJ is created and the Effective From date of the license is greater than the previous Effective From date plus 4 years.
Task name:	IBIS Background Check About To Expire
Description:	This task is to remind workers to complete IBIS background checks for Parent 1 and Parent 2, and anyone with the role of Licensee.
Creation:	<p>This task is created when worker completes a licensing activity application with Decision = Create License (except for Out of State licenses) and a DOJ Background Check doesn't exist where the Effective To date on the Background Check is today or a future date.</p> <p>If an IBIS background check exists, the task is created 30 days before the due date of the next background check; ; i.e. the next background check due date is based on the Effective From date of the license plus 4 years. IBIS background checks are due every four 4 years and is calculated based on the Effective From date of the license.</p>
Removal:	This task is removed when a background check of type IBIS is created and the Effective From date of the license is greater than the previous Effective From date plus 4 years.

Task name:	ICPC Background Check About to Expire
Description:	This task is to remind workers to complete ICPC background checks for Parent 1 and Parent 2, and anyone with the role of Licensee on the Out of State license.
Creation:	This task is created when a worker completes an Out of State foster home license and an a qualifying ICPC background check doesn't exist. If an ICPC background check exists, a task is created for the worker 45 days before the due date of the next background check.
Removal:	This task can be removed when a background check of type ICPC – Background Check is created and the Effective To date is greater than the Effective To date of the existing ICPC background check or if the ICPC -Background Check does not exist. This task can also be removed when a background check of the Type ICPC – Background Check is created and the Effective To date is blank.

Private Providers

Task name:	Facility License About To Expire
Description:	This task is to remind workers that the facility license for a private provider is about to expire and that continuation materials need to be sent 90 days prior to the Effective Date of an active license.
Creation:	This task is created when a facility license is completed with a status of Active or Renewed.
Removal:	This task is removed when the status of the license is changed to Renewed, Revoked, or Closed.
Task name:	Report due for complaint/SIR
Description:	This task is to remind workers when a report is due for a complaint.
Creation:	This task is created when a complaint record is created.
Removal:	This task is removed when the Completed date is documented on the Complaint page. This task can be removed by a supervisor via Task Management.
Task name:	Background Checks Due
Description:	This task is to remind workers that background checks need to be completed/documented for a private provider each time a license is issued or renewed. Background checks are due on the Effective Date of the license.
Creation:	This task is created when a license is created with a Status of Active or Renewed.
Removal:	This task is removed when both DOJ and IBIS background checks are created for the provider personnel with the current role of 'Applicant/Licensee' and the Date of Document displayed on the Imaging page exists between 65 days prior to or 30 days after the Effective From date on the license. This task can be removed by a supervisor via Task Management.
Task name:	Next Site Visit
Description:	This task is to remind the worker to document another Site Visit.
Creation:	This task is created in the following situations: <ul style="list-style-type: none"> Upon creation of a Site Visit if it has the latest "Visit Date" of all visits to that provider and either the "Next Visit Date" changed or no Next Site Visit task already exists for this Site Visit Restoration of a revoked license via appeal where a Next Site Visit task existed.
Removal:	This task is removed in the following ways: <ul style="list-style-type: none"> Another Next Site Visit task is created to replace it Approval of an Additional Licensing Action of "Close" for this provider's license Revocation of the provider's license By a supervisor via Task Management.