A YEAR IN THE LIFE OF SWAN POST-PERMANENCY SERVICES

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STATEWIDE ADOPTION AND
PERMANENCY NETWORK

This flowchart provides an overview of a year of SWAN Post-permanency services.

SWAN Post-permanency services begin when a family calls the SWAN Helpline.
　　　　1. The SWAN Helpline specialist ensures that the family meets the eligibility criteria if it is a family that has never before received services. If the family meets the criteria, a referral is submitted to the affiliate of choice.
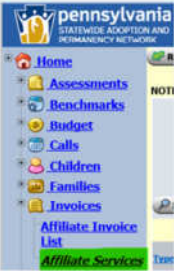　　　　2. The SWAN Helpline specialist ensures continued initial eligibility if the family has received prior services. The Post-perm technical assistants (PPTAs) then determine if the family meets the 2015 Reauthorization Criteria. If they do, a referral is submitted to the affiliate of choice.

Eligibility criteria can be found in the Bulletin and the 2015 Reauthorization Criteria can be found in the SWAN Toolkit. (www.swantoolkit.org)
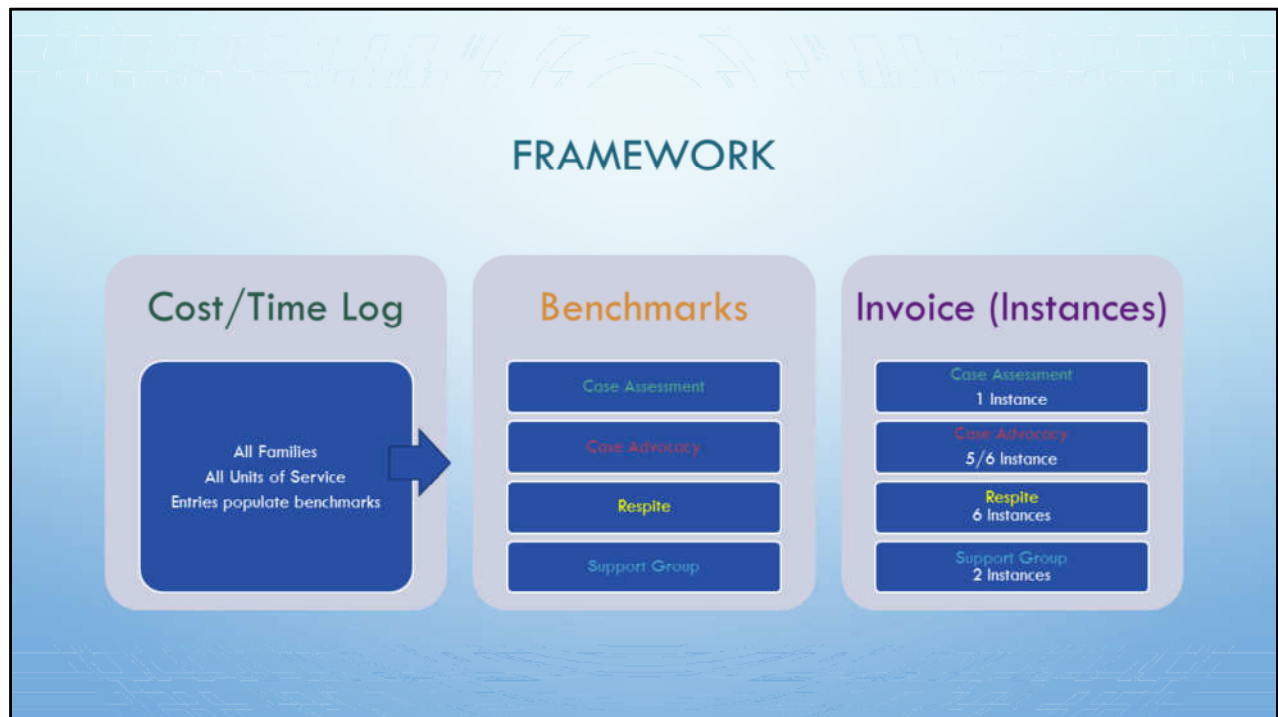
For all SWAN Post-permanency units of service, the affiliate will be completing a Cost/Time Log, the benchmarks, and invoices for the services completed.

      1. The Cost/Time Log populates information to the benchmarks.

      2. Benchmarks cover the entire length of each unit of service.

      3. Benchmarks are submitted at the conclusion of the entire unit of service.

A Year in the Life of SWAN Post-permanency Services

Cost/TimeLOG	BENCHMARKS	INVOICE
• Entered for each unit • Best practice to enter daily or at least weekly • Entries populate Benchmark	• 1 Benchmark spans all instances • Submitted after reassessment	• Monthly/instance • Case Advocacy=5 or 6 • Respite=6 • Support Group=2
Benchmarks- Benchmark Cost/Time Log Entry	Services- Service Search- Require	Invoices- Affiliate Services- Ready for Invoicing

Here you see where to locate each component in the portal.
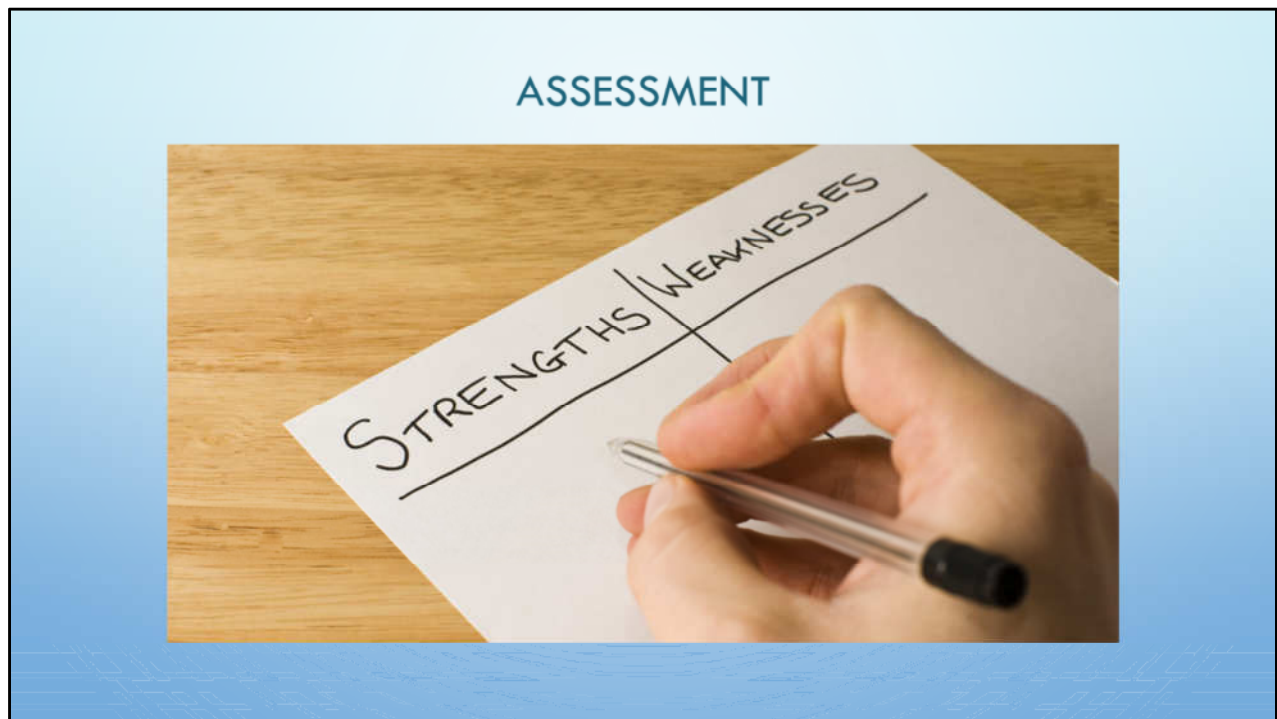
The referral is initiated by the SWAN Helpline.

According to the benchmarks, accepting or rejecting the referral needs to occur within 5 days.

Contact with the family needs to occur within 5 days.

Best practice is to contact the family as quickly as possible.

The assessment needs to be completed within 30 days.

Document contact (or lack thereof) in the Cost/Time Log / Benchmarks.

SWAN Helpline contacts the family at approximately 14 days to ensure that contact has been made.

The SWAN PPTAs ensure that the assessments are completed within the benchmark timeframe.

When searching for a family for the Assessment unit of service, it is best to use the <u>Referral Search</u> feature.

        1. Click on the <u>Family</u> radial button.
        2. Enter the last and first names of the family.
        3. Click <u>Search</u>.

The results of the search will show all assessments referred.

POST-PERM ASSESSMENT REFERRAL

- INITIATED BY SWAN HELPLINE
- EMAILED TO DESIGNATED CONTACT

This is the referral that is sent to the selected affiliate.

* SWAN Helpline verifies the family demographics and contact information prior to sending the referral to the affiliate.

If an affiliate CAN'T accept a referral:

1. Contact SWAN Regional technical assistant (RTA) and SWAN Post-permanency technical assistant (PPTA) within 5 days according to the benchmarks.

2. Withdraw the referral as soon as possible.

ASSESSMENT DETAILS

You can search for a family through the <u>Service Search</u> link. The Service Search page is the best way to search for a family's SWAN Post-permanency services.

You have the option of selecting a specific service type and service status. This is an alternative to the Referral Search.

To access more details regarding the family, first click on the <u>Require</u> link.

ASSESSMENT DETAILS

Service on Existing Request (Withdrawal, Void, or Invoice in Error):	No	
Service Status = Referred:	Yes	
Benchmarks Completed:	No	Benchmark Details
County Certification Completed:	Not Required	Certification Details
CY131 Family Registration Completed:	Not Required	Family Details
Family Profile Completed (Synopsis); Not Required:	Not Required	Family Synopsis
Family Approval Document:	Not Required	Family Approval Document
Assessment Completed:	No	Assessment Details
6 Month Review Completed:	Not Required	Review Details
Service Cannot Be Invoiced Until:	Not Applicable	

Next click on the Assessment Details link.

Once the Assessment Details load, click the Edit link to enter the information from the assessment tools completed during the assessment process.

Once saved and submitted, the SWAN PPTAs review the *Child Safety* and *Risk Assessments* and the *Services Recommended* before processing.

When this step is complete, the affiliate will receive the referral for the requested units of service.

Please note, best practice is to only request services with concrete plans. For example, only request respite once the Respite Plan is complete and only request support group once the family attends a session.
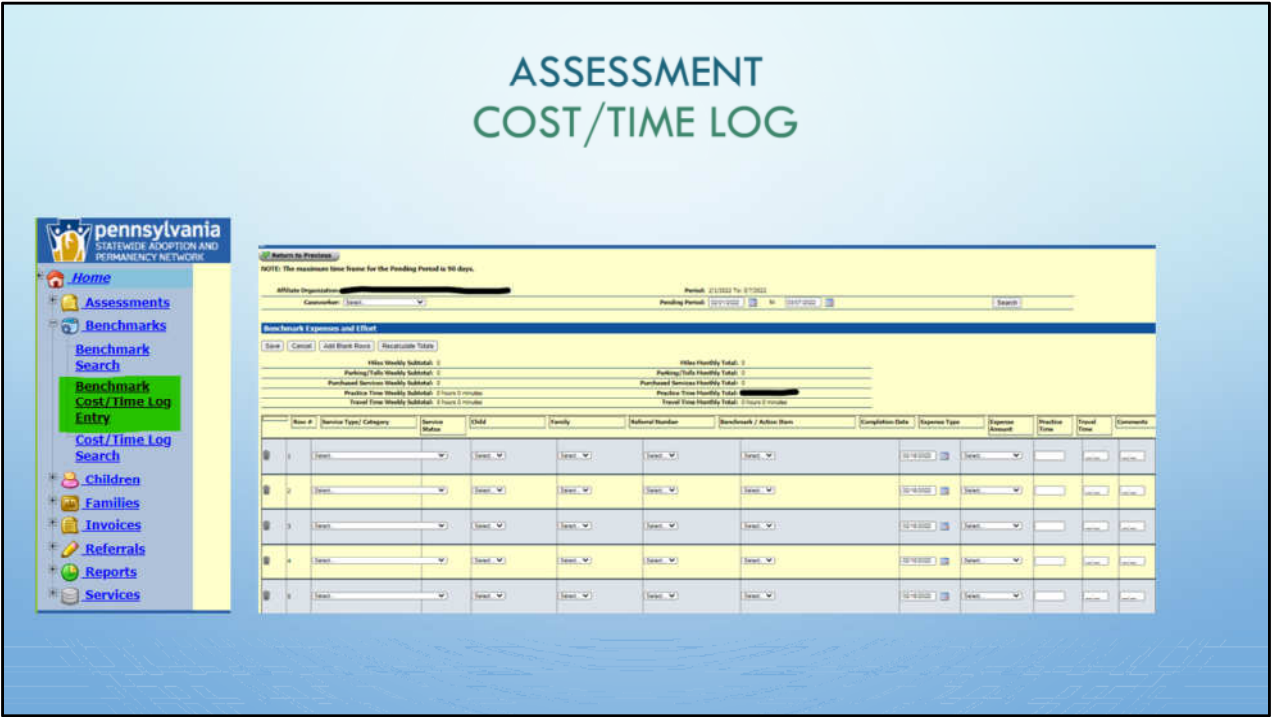
The Cost/Time Log is available for the duration of the assessment process.

       * It can be located in the <u>Benchmarks</u> portion of the portal under the <u>Benchmark Cost/Time Log Entry</u> link.

Best practice is to complete the log on an ongoing and frequent basis.

Once in the Cost/Time Log:

        1. Select the unit of service from the <u>Service Type/Category</u> dropdown.

        2. Select the <u>Family</u> from the dropdown.

ASSESSMENT
COST/TIME LOG

The date defaults to the day you are working in the portal. Change that to the date the action item is completed if necessary.

Select a *Benchmark Action Item* or main numeric step (bucket).

Add the following information:
1. Expense Type
2. Expense Amount
3. Practice Time
4. Travel Time
5. Comments

SAVE SAVE SAVE frequently and often

What you enter here populates the benchmarks, including the comments.
        *Comments are important information that allows your SWAN PPTA to have knowledge of the unit of service.

Service search is the best search tool to use when searching for SWAN Post-permanency services.

        1. Select the Family radial button.
        2. Enter the last and first names of the family.
        3. Optional:
                1. Select a Service Type.
                2. Select a Service Status.

This allows the portal user to see a complete history of a family's current and previous services. It allows the user to see which instances have been referred, invoiced, or withdrawn.

Once the unit of service has been selected:

1. Click on the <u>Require</u> link.
2. Click on the <u>Benchmark Details</u>.

Information entered into the Cost/Time Log will have populated into the benchmark main numeric steps/buckets.

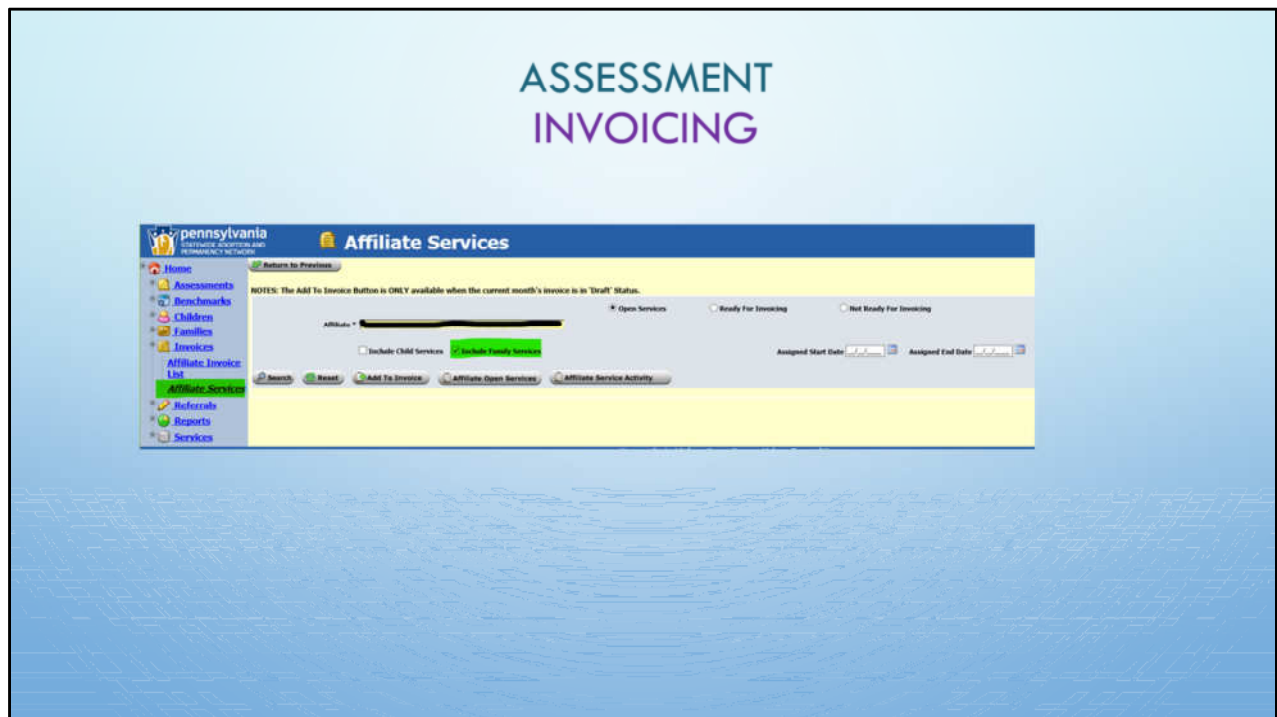Benchmark templates need to be completed with dates.

It is best practice that each worker complete their own benchmarks in order to obtain an accurate log.

In addition to the information from the Cost/Time Log in the benchmarks that populates into the main numeric steps/buckets (1.1, 2.1, 3.1), there will be blank lines for additional information.

Supplemental information can be added to the benchmarks sections 1.2, 2.2, etc.
             *Dates must be added to required benchmark items. Comments are highly
suggested.

SAVE frequently during the editing process.

SUBMIT once the assessment is completed.

Not all workers have access to invoicing.

Select:

      1. Invoices from Menu;
      2. Then Affiliate Services;
      3. Select the radial button for Include Family Services;
      4. For this example, we chose Open Services;
      5. And Search.

The assessment opens for invoicing once the Assessment Details are submitted.

Benchmarks and assessment details must be submitted before the unit can be invoiced.

ASSESSMENT QUESTIONS
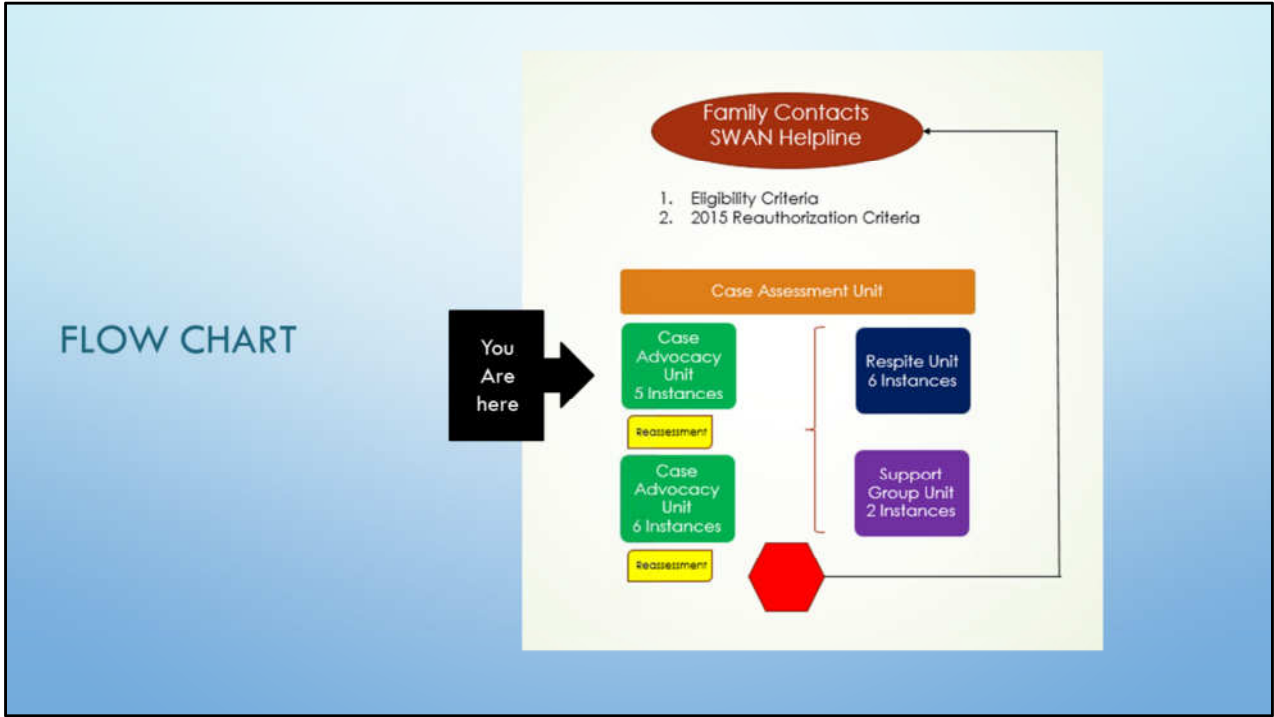
If case advocacy has been requested, the affiliate will receive a referral for 5 instances for the initial unit of service.

CASE ADVOCACY

Here are some examples of what an affiliate worker can do as part of the case advocacy unit.

The Cost/Time Log is available for the duration of the case advocacy unit.
    * It can be located in the Benchmarks portion of the portal under the Benchmark Cost/Time Log Entry link.

Best practice is to complete the log on an ongoing and frequent basis.

Once in the Cost/Time Log:

      1. Select the unit of service from the <u>Service Type/Category</u> dropdown.

      2. Select the <u>Family</u> from the dropdown.

The date defaults to the day you are working in the portal. Change that to the date the action item is completed if necessary.

Select a *Benchmark Action Item* or main numeric step (bucket).

Add the following information:
> 1. Expense Type
> 2. Expense Amount
> 3. Practice Time
> 4. Travel Time
> 5. Comments

SAVE SAVE SAVE frequently and often

What you enter here populates the benchmarks, including the comments.
> *Comments are important information that allows your SWAN PPTA to have knowledge of the unit of service.

Service search is the best search tool to use when searching for SWAN Post-permanency services.

This allows the portal user to see a complete history of a family's current and previous services. It allows the user to see which instances have been referred, invoiced, or withdrawn.

In order to locate a family from the Service Search page:
> 1. Select Family
> 2. Select Service Type – Post Permanency Advocacy/Case Management
> 3. Select a Service Status

Once the unit of service has been selected:

      1. Click on the <u>Require</u> link.

      2. Click on the <u>Benchmark Details</u>.

Information entered into the Cost/Time Log will have populated into the benchmark main numeric steps/buckets.
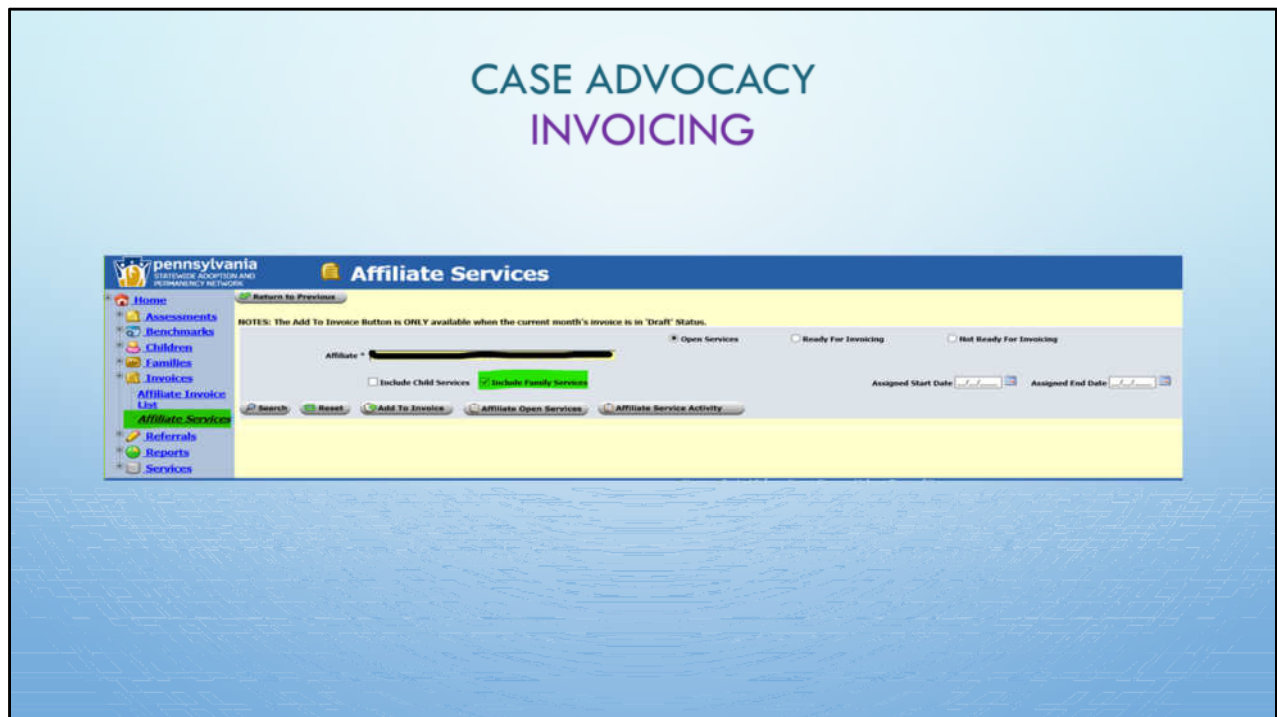
It is best practice that each worker complete their own benchmarks in order to obtain an accurate log.

In addition to the information from the Cost/Time Log that populates into the main numeric steps/buckets (1.1, 2.1, 3.1), there will be blank lines for additional information.

Supplemental information can be added to benchmarks sections 1.2, 2.2, etc.
             *Dates must be added to required benchmark items. Comments are highly suggested.

SAVE frequently during the editing process.

SUBMIT once the reassessment is completed and the dates are entered into the benchmark template section.

Not all workers have access to invoicing.

Select:

                  1. Invoices from Menu;
                  2. Then Affiliate Services;
                  3. Select the radial button for Include Family Services;
                  4. For this example, we chose Open Services;
                  5. And Search.

Every 30 days a new instance will open for invoicing.

Instance numbers are not labeled here. Services are defined by the date due.

In order to invoice the final instance, the benchmarks and the reassessment must be completed.

In order to see how many instances are remaining, Service Search is always the best choice for viewing services.

CASE ADVOCACY QUESTIONS

RESPITE

WHAT IS RESPITE?

- THESE ARE ACTIVITIES OR EVENTS THAT ARE ABOVE THE NORMAL EXPECTATIONS OF BEING A FAMILY
- MUST MEET THE GOALS OF THE FAMILY AND BE SUPPORTED BY THE FAMILY SUPPORT PLAN
- RESPITE IS **UP TO** 48 HOURS A MONTH
- ACTIVITIES, INCLUDING CAMPS, CULTURAL CAMPS, CULTURAL EVENTS
- SPECIAL EVENTS SUCH AS EVENTS FOR YOUTH ON THE AUTISM SPECTRUM OR WITH SENSORY DISORDERS, OR OTHER SPECIAL NEEDS
- EVENTS TO HELP WITH FAMILY BONDING/ATTACHMENT, ALL MEMBERS OF THE FAMILY
- ACTIVITIES USED TO STRENGTHEN PARENTAL RELATIONSHIP – WHERE RESPITE IS PROVIDED FOR THE CHILDREN ALLOWING THE ADULTS RELIEF FROM PARENTING RESPONSIBILITIES
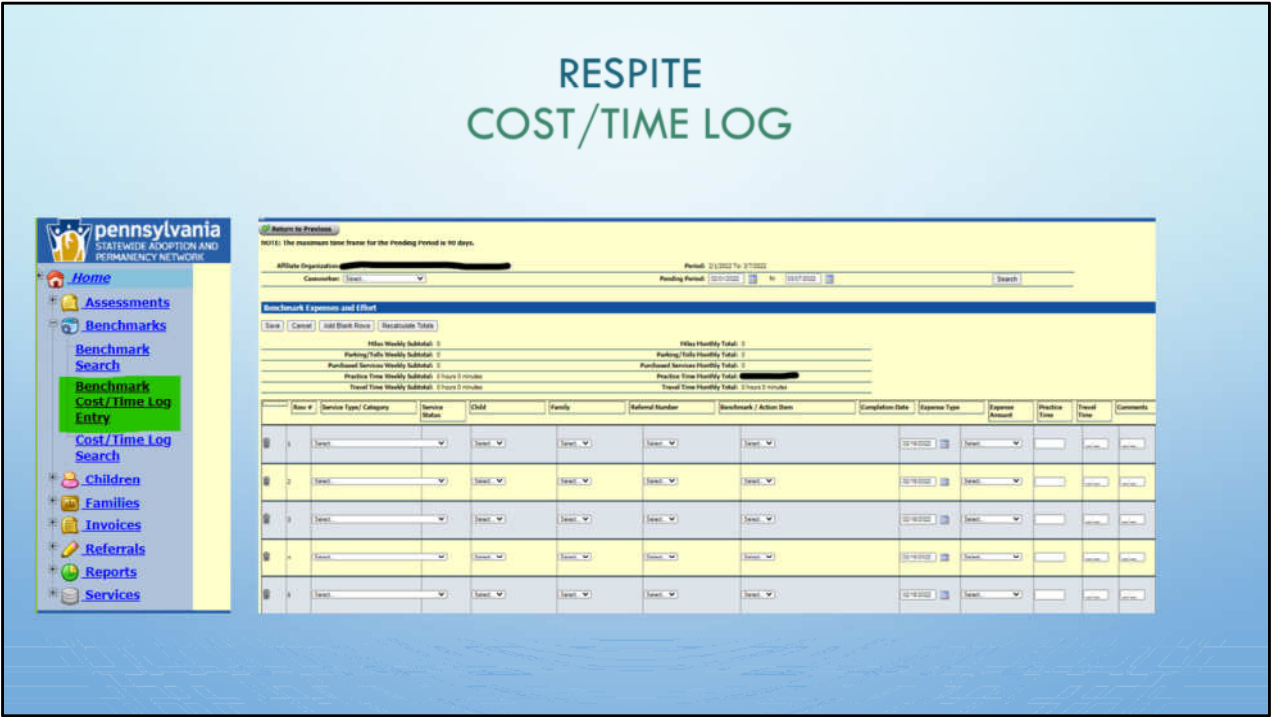- ACTIVITIES USED TO STRENGTHEN PARENT/CHILD RELATIONSHIP

These are some examples of what can be accomplished during the respite unit.

WHAT RESPITE ISN'T

- **NOT JUST FOR ENTERTAINMENT** PURPOSES OR FOR ACTIVITIES OR EVENTS THAT ARE PART OF THE NORMAL EXPECTATIONS OF BEING A FAMILY
- **NO DURABLE GOODS**, SUCH AS TRAMPOLINES OR SPORTS OR MUSIC EQUIPMENT
- FAMILY VACATIONS – EXTENDED VACATIONS WITH OR WITHOUT CHILDREN
- RESPITE SO PARENTS CAN TAKE VACATION/WORK/ATTEND TO BUSINESS NEEDS
- NO AMUSEMENT PARKS
- **NO GENERIC** TICKETED ENTERTAINMENT EVENTS, SUCH AS LIVE CHARACTER SHOWS, CONCERTS
- THERAPY
- DAY CARE/SCHOOL/TUTORING
- CASH OR GIFT CARDS

These are some examples of what **can't** be done with the respite unit.

The Cost/Time Log is available for the duration of the unit.
   * It can be located in the Benchmarks portion of the portal under the Benchmark Cost/Time Log Entry link.

Best practice is to complete the log on an ongoing and frequent basis.

Once in the Cost/Time Log:

      1. Select the unit of service from the <u>Service Type/Category</u> dropdown.

      2. Select the <u>Family</u> from the dropdown.

The date defaults to the day you are working in the portal. Change that to the date the action item is completed if necessary.

Select a *Benchmark Action Item* or main numeric step (bucket).

Add the following information:
1. Expense Type
2. Expense Amount
   ***Make sure for Respite Cost/Time Logs that you are indicating purchased services to include the amount of money reimbursed to the family.**
3. Practice Time
4. Travel Time
5. Comments

SAVE SAVE SAVE   frequently and often

What you enter here populates the benchmarks, including the comments.
    *Comments are important information that allows your SWAN PPTA to have knowledge of the unit of service.
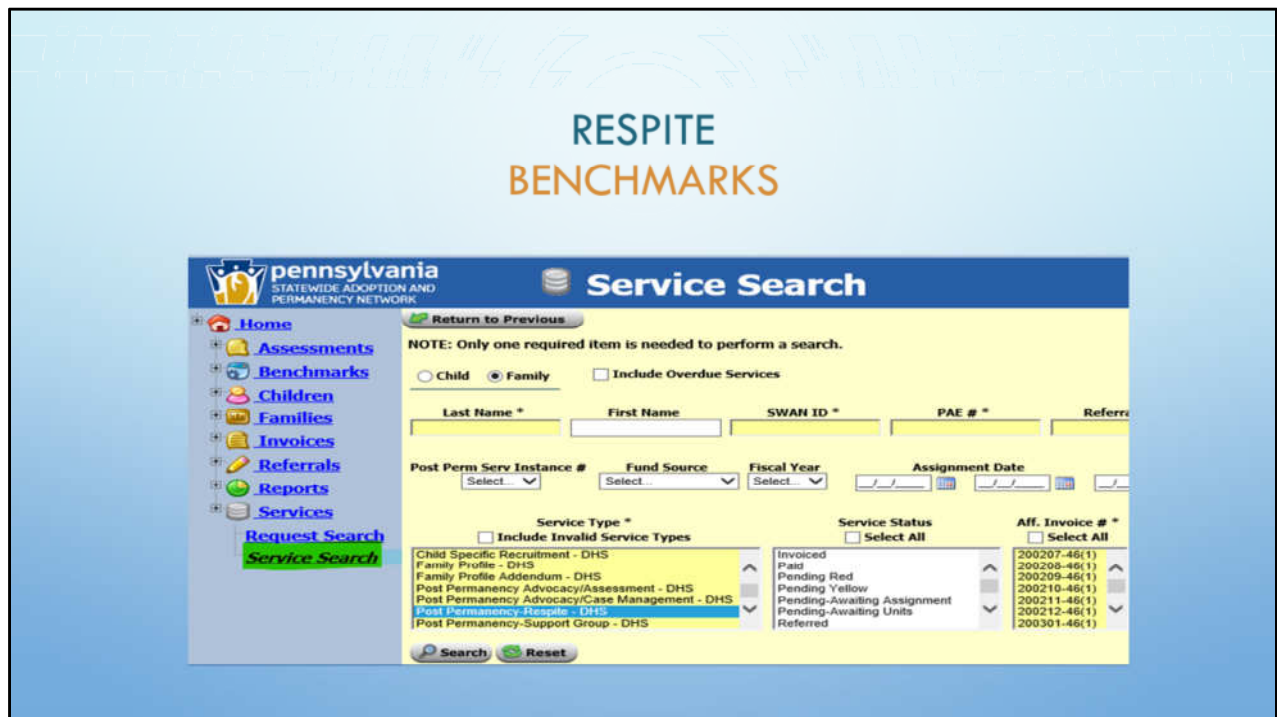
Service search is the best search tool to use when searching for SWAN Post-permanency services.

The respite unit consists of 6 instances.

This allows the portal user to see a complete history of a family's current and previous services. It allows the user to see which instances have been referred, invoiced, or withdrawn.

In order to locate a family from the Service Search page:

            1. Select Family

            2. Select Service Type – Post Permanency Respite

            3. Select a Service Status

Once the unit of service has been selected:
1. Click on the Require link.
2. Click on the Benchmark Details.

Information entered into the Cost/Time Log will have populated into the benchmark main numeric steps/buckets.

It is best practice that each worker complete their own benchmarks in order to obtain an accurate log.

In addition to the information from the Cost/Time Log that populates into the main numeric steps/buckets (1.1, 2.1, 3.1), there will be blank lines for additional information.

Supplemental information can be added to benchmarks sections 1.2, 2.2, etc.
    *Dates must be added to required benchmark items. Comments are highly suggested.

SAVE frequently during the editing process.

SUBMIT once the reassessment is completed and the dates are entered into the benchmark template section.

Not all workers have access to invoicing.

Select:

1. Invoices from Menu;
2. Then Affiliate Services;
3. Select the radial button for Include Family Services;
4. For this example, we chose Open Services;
5. And Search.

Every 30 days a new instance will open for invoicing.

Instance numbers are not labeled here. Services are defined by the date due.

In order to invoice the final instance, the benchmarks and the reassessment must be completed.

In order to see how many instances are remaining, Service Search is always the best choice for viewing services.

RESPITE QUESTIONS

WHAT ARE SOME TYPES OF GROUPS?

- KINSHIP
- MEDICAL NEEDS
- INTERNATIONAL
- GROUPS FOR CHILDREN
- TEEN GIRLS
- TEEN BOYS
- SIBLINGS
- ART
- MUSIC

- BOOK CLUBS
- FAMILY GROUPS
  PARENTS MEET / CHILDREN'S GROUPS
  AT SAME TIME

**ALL SUPPORT GROUPS CAN BE
DONE VIRTUALLY**

These are some examples of support groups.

The Cost/Time Log is available for the duration of the unit.
           * It can be located in the Benchmarks portion of the portal under the Benchmark Cost/Time Log Entry link.

Best practice is to complete the log on an ongoing and frequent basis.

Once in the Cost/Time Log:

      1. Select the unit of service from the <u>Service Type/Category</u> dropdown.

      2. Select the <u>Family</u> from the dropdown.

The date defaults to the day you are working in the portal. Change that to the date the action item is completed if necessary.

Select a *Benchmark Action Item* or main numeric step (bucket).

Add the following information:
       1. Expense Type
       2. Expense Amount
       3. Practice Time
       4. Travel Time
       5. Comments

SAVE SAVE SAVE   frequently and often

What you enter here populates the benchmarks, including the comments.
     *Comments are important information that allows your SWAN PPTA to have knowledge of the unit of service.

Service search is the best search tool to use when searching for SWAN Post-permanency services.

        1. Select the Family radial button.
        2. Enter the last and first names of the family.
        3. Optional:
                1. Select a Service Type.
                2. Select a Service Status.

This allows the portal user to see a complete history of a family's current and previous services. It allows the user to see which instances have been referred, invoiced, or withdrawn.

Once the unit of service has been selected:
1. Click on the Require link.
2. Click on the Benchmark Details.

Information entered into the Cost/Time Log will have populated into the benchmarks.

It is best practice that each worker complete their own benchmarks in order to obtain an accurate log.

In addition to the information from the Cost/Time Log that populates into the main numeric steps/buckets (1.1, 2.1, 3.1), there will be blank lines for additional information.

Supplemental information can be added to the benchmarks sections 1.2, 2.2, etc.
            *Dates must be added to required benchmark items. Comments are highly suggested.

SAVE frequently during the editing process.

SUBMIT once the reassessment is completed and the dates are entered into the benchmark template section.

Not all workers have access to invoicing.

Select:

1. Invoices from Menu;
2. Then Affiliate Services;
3. Select the radial for Include Family Services;
4. For this example, we chose Open Services;
5. And Search.

The family must attend 2 out of 3 sessions in order for the affiliate to invoice.

Every 3 months a new instance will open for invoicing.

Instance numbers are not labeled here. Services are defined by the date due.

In order to see how many instances are remaining, Service Search is always the best choice for viewing services.
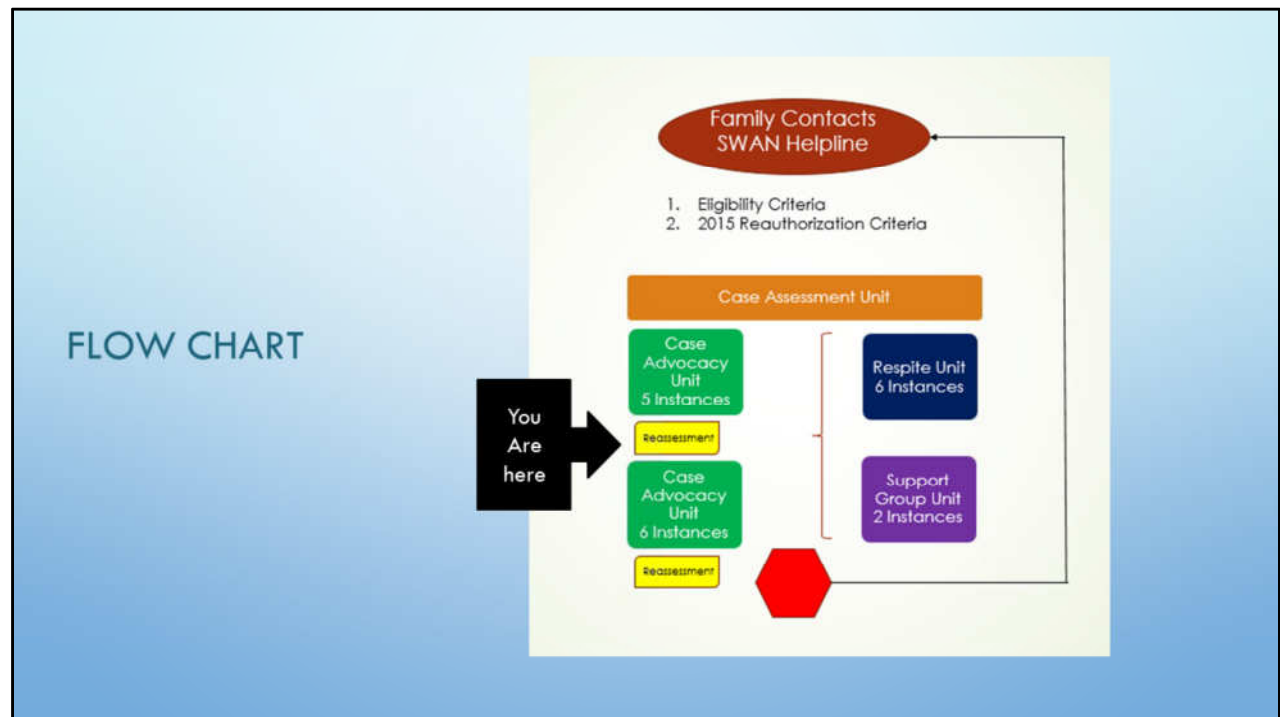
Menus may look different due to your portal administrative rights.
Once a unit of case advocacy, a unit of respite and/or a unit of support group have been completed, it is time for the reassessment to be completed.

In order for a reassessment to be completed, the following must occur:
    1. All assessment tools must be administered.
    2. The Family Support Plan must be updated and the family must be given a copy.
    3. The information from the assessment tools must be entered into the Assessment Details section of the Portal.
            *Respite and support group may be requested only if the family did not have them in the first round of services.
            *If the family and the worker feel that the goals have been successfully met, No Services Recommended is selected.
    4. The benchmarks must be completed.

To locate the details for the reassessment:
> 1. Use the *Service Search* screen.
> 2. Select a <u>Service Type</u>.
> 3. Select a <u>Service Status</u>.

To continue with the reassessment process:

1. Select <u>Require</u>.
2. Select <u>Review Details</u>.

When a unit of case advocacy is requested at this 6 month review, the unit will consist of 6 instances.
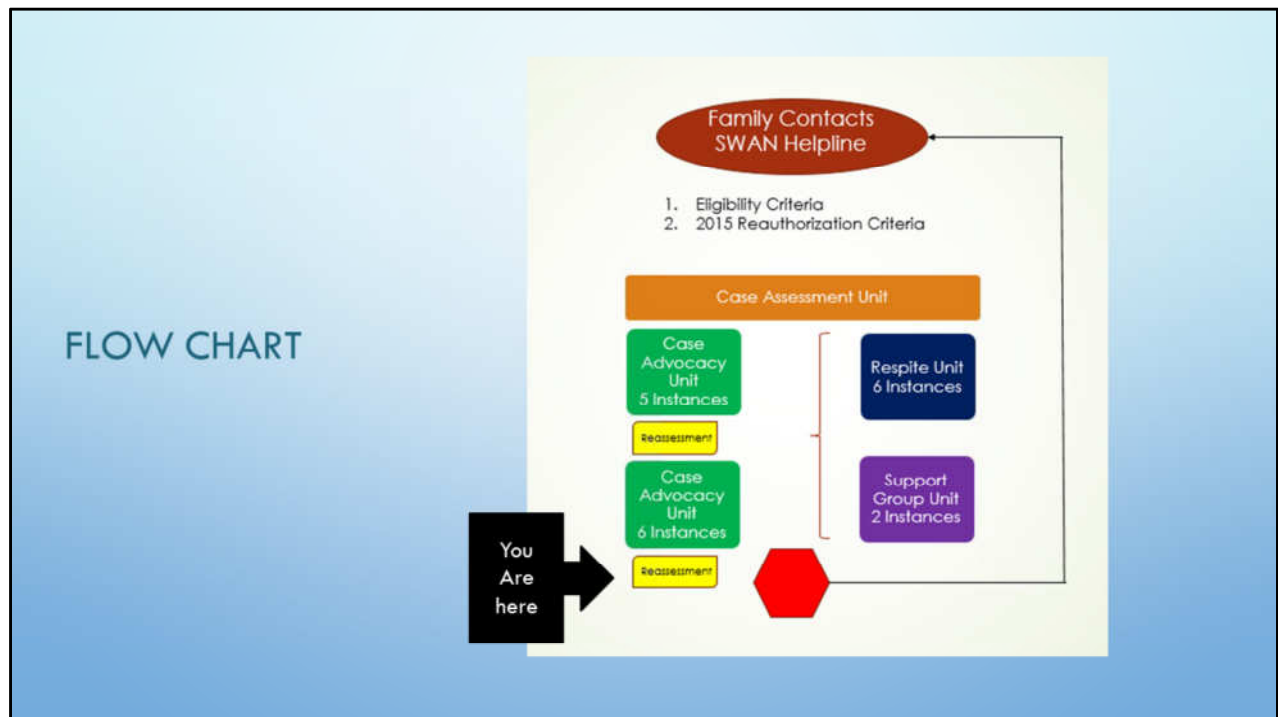
Once you have completed any combination of a maximum of 2 units of case advocacy, one unit of respite, and one unit of support group, SWAN Post-permanency services are considered complete.

In order for a reassessment to be completed, the following must occur:

       1. All assessment tools must be administered.

       2. The Family Support Plan must be updated and the family must be given a copy.

       3. The information from the assessment tools must be entered into the Assessment Details section of the Portal.

       4. The benchmarks must be completed.

Service search is the best search tool to use when searching for SWAN Post-permanency services.

        1. Select the Family radial button.

        2. Enter the last and first names of the family.

        3. Optional:

                1. Select a Service Type.

                2. Select a Service Status.

This allows the portal user to see a complete history of a family's current and previous services. It allows the user to see which instances have been referred, invoiced, or withdrawn.

Once the unit of service has been selected:
1. Click on the Require link.
2. Click on the Benchmark Details.

At this point, from the edit screen, select <u>No Services Recommended</u>.

The family is considered to have completed services.

A third unit of case advocacy CAN'T be requested. A second unit of respite or of support group CAN'T be requested.

If/when there is a change in the status of the family, the family needs to call the SWAN Helpline. At that point, the services start from the beginning.

WITHDRAWAL INSTRUCTIONS FOR SWAN POST-PERMANENCY INSTANCES

Affiliates must withdraw their own SWAN Post-permanency services.

Please note that if any instance of a SWAN Post-Permanency unit of service was invoiced:

1. Benchmarks and Review (re-assessment) must be completed prior to a withdrawal.

2. Instances cannot be withdrawn until after 120 days from the assignment date.

3. Check in the Billing Requirements screen to ensure billing requirements have been met.

To electronically withdraw a SWAN Post-permanency unit or instance:

1. Click on Services.
2. Enter the family's last and first names.
3. Under Service Type, find the unit you want to withdraw.
4. Select Search. This will open the "Service Details" screen.
5. Enter the information required:
* Status
* Status change reason

* Comment
6. Click on Create Withdraw Notification.