

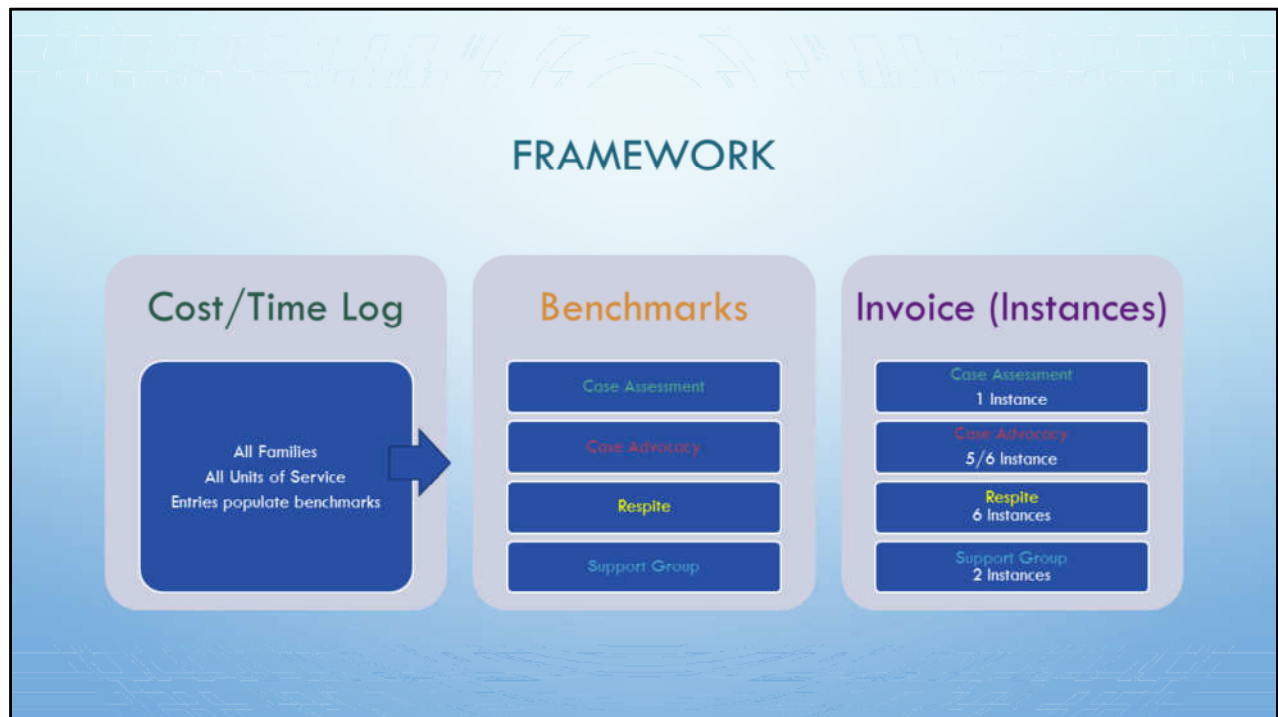
This flowchart provides an overview of a year of SWAN Post-permanency services.

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.



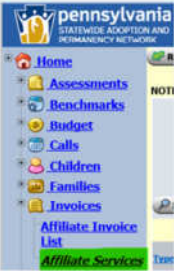
2. The SWAN Helpline specialist ensures continued initial eligibility if the family has received prior services. The Post-perm technical assistants (PPTAs) then determine if the family meets the 2015 Reauthorization Criteria. If they do, a referral is submitted to the affiliate of choice.

Eligibility criteria can be found in the Bulletin and the 2015 Reauthorization Criteria can be found in the SWAN Toolkit. (www.swantoolkit.org)

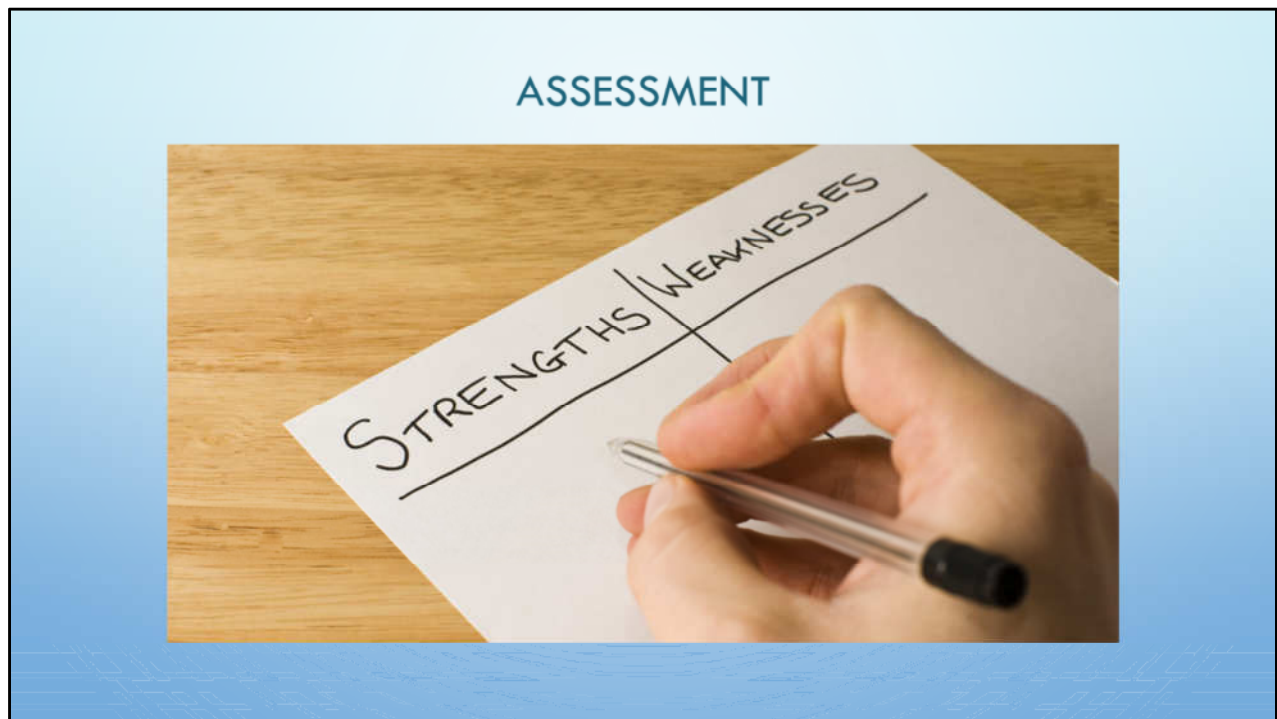


For all SWAN Post-permanency units of service, the affiliate will be completing a Cost/Time Log, the benchmarks, and invoices for the services completed.

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.

Cost/TimeLOG	BENCHMARKS	INVOICE
<ul style="list-style-type: none">Entered for each unitBest practice to enter daily or at least weeklyEntries populate Benchmark	<ul style="list-style-type: none">1 Benchmark spans all instancesSubmitted after reassessment	<ul style="list-style-type: none">Monthly/instanceCase Advocacy=5 or 6Respite=6Support 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.

REFERRAL

- EMAIL NOTIFICATION
- PORTAL SEARCH FOR THOSE WITH ADMINISTRATIVE PORTAL RIGHTS

Referral Search

Return to Previous

NOTE: Only one required item (denoted with an asterisk *) is needed to perform a search.

☐ Child ☐ Family

Last Name * First Name SWAN ID * Referral Number * Referral Type Referral Status

Assigned in Last Referred By * (Affiliate or County is a required item)

☐ 30 days ☐ 60 days ☐ 90 days ☒ Any ☐ Affiliate ☐ County ☐ Helpline

Search Reset

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

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

The results of the search will show all assessments referred.

POST-PERM ASSESSMENT REFERRAL

- INITIATED BY SWAN HELPLINE
- EMAILED TO DESIGNATED CONTACT

SWAN Helpline Referral # RH220126-241981
Family Request for Post-Permanency Services
 Referral Submitted: 1/26/2022 9:40:04 AM

Date Of Initial Contact: 01/26/2022		Source: Family	County:
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Adoptive Family Contact Information

Partner 1: John, Vince	SSN #	SWAN ID: R-23115	Partner 2: Logan, Paula	SSN #
Partner 1 Phone Notes (Best Time To Call, etc)			Partner 2 Phone Notes (Best Time To Call, etc)	

Addresses

Form	Type	Address Line1	Address Line2	City	State	Zip	County	Current	Mod Date
residence		822 Baker Road		Prichard	AL	35092	Wingo	Yes	01/25/2022

Communications

Form	Type	Phone	Ext	Fax	Mobile	Email	Start Time	End Time	Current	Mod Date
residence		204-875-0823				lutherlutherluther@gmail.com			Yes	01/25/2022

Household Composition

Last Name	First Name	SSN	DOB	Gender	Relationship	Relationship (Other)	All Name	Mod Date
Schul	Anna		02/20/2000	Female	Daughter (Birth)		Yes	01/25/2022
Schul	Shay		11/3/2016	Female	Daughter (Adoption)		Yes	01/25/2022
Schul	Julie		02/2/2000	Female	Daughter (Birth)		Yes	01/25/2022

Adoptive Child For Whom Services Are Requested

PRE #	SWAN ID: C-247241	DOB #	DOB: 11/03/2010
Last Name: Singh	First Name: Steven	SSN	

Court Information

Court of Jurisdiction: Wingo	Date Of Adoption: 09/02/2020
Type of Adoption Placement:	

Address and Phone Number (if different than parents)

Address 1:	Address 2:	City:	State:	Zip:
County of:	Phone #:			

If this is a SWAN Child, complete the following:

SWAN Affiliates Completing Referral:
County with Custody Prior to Adoption: Wingo

Post-Permanency Information

Brief description of the problems for which services are requested:

Shay is calling to request more PP services for her adopted daughter Shay who is 11 years old. Shay is intellectually disabled, ADHD and PTSD, she does not take medications. Shay's mother and siblings got married and moved out of the home, now other two siblings also want to college this fall and are no longer in the household much. Shay appears to be having a hard time dealing and adjusting to this change. Shay was used to having three other siblings living in the household with her no room being the only child in the home. Shay appears to be having a hard time dealing with this. Also when her siblings come home Shay also has a hard time adjusting to the change of her siblings being home. Shay has the need to check her in control and in charge.

SWAN Post-Permanency Services to be referred (check all that apply) - Units of Service:

☐ Abstinence
 ☐ Support Group
 ☐ Respite

Supportive / Treatment Resources Involved:

Psychiatric once a month

REV 9/10

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

Home

Assessments

Benchmarks

Children

Families

Invoice

Referrals

Reports

Services

Return to Previous

NOTE: Only one required item is needed to perform a search.

Child

Family

Include Overdue Services

Last Name *

First Name

SWAN ID *

PIR # *

Post Perm Serv Instance #

Parent Source

Fiscal Year

Assignment Date

Service Type *

Service Status

All Invoice # *

Include Inactive Service Types

Select All

Select All

Child Specific Placement - DHS

Family Profile - DHS

Family Profile Assessment - DHS

Post Permanency Advocacy/Assessment - DHS

Post Permanency Advocacy Case Management - DHS

Post Permanency Reunite - DHS

Post Permanency Support Group - DHS

Referred

Pending

Pending Reel

Pending Yellow

Pending-Awaiting Assignment

Pending-Awaiting Link

Referred

200297-4611

200298-4611

200299-4611

200210-4611

200211-4611

200212-4611

200311-4611

Search

Reset

Service Type	Family Name	Child Name	Referral #	Reassess #	Invoice #	Service Status	Status Date	Assignment Date	Instance
Post Permanency Advocacy/Assessment (V500.00)	Valentine, Nelson and Lutz, Joyce	Evon, Lance	PH220202-242437			Referred	2/4/2022	2/4/2022	
Require Post Permanency Advocacy/Assessment (V500.00)	Todd, Jennifer Lee and Duarte, Rachelle Rose	Maddox, Bonnie	PH220125-241893			Referred	1/27/2022	1/27/2022	
Require Post Permanency Advocacy/Assessment (V500.00)	Morales, Tamiela and Bush, Lea	Hall, Cherie	PH220214-243351			Referred	2/16/2022	2/16/2022	
Require Post Permanency Advocacy/Assessment (V500.00)	Lyons, Preston and Hanks, Johnathan	Cobb, Jay	PH220128-242142			Referred	1/31/2022	1/31/2022	

You can search for a family through the [Service Search](#) 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 [Require](#) link.

Cost/Time Log, Benchmarks & Invoicing Guide

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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.

ASSESSMENT DETAILS

Assessment Information

Assessment ID: 1234567890

Assessment Name: [REDACTED]

Assessment Date: 12/15/2023

Assessment Status: [REDACTED]

Referral ID: 1234567890

Referral Name: [REDACTED]

Referral Date: 12/15/2023

Referral Status: [REDACTED]

Parent Information

Parent ID: 1234567890

Parent Name: [REDACTED]

Parent Email: [REDACTED]

Parent Phone: [REDACTED]

Child Information

Child ID: 1234567890

Child Name: [REDACTED]

Child Age: [REDACTED]

Child Gender: [REDACTED]

Assessment Tools

Tool ID: 1234567890

Tool Name: [REDACTED]

Tool Description: [REDACTED]

Tool Status: [REDACTED]

Tool ID: 1234567890

Tool Name: [REDACTED]

Tool Description: [REDACTED]

Tool Status: [REDACTED]

Child Safety Assessment

Child Safety ID: 1234567890

Child Safety Name: [REDACTED]

Child Safety Date: 12/15/2023

Child Safety Status: [REDACTED]

Child Safety ID: 1234567890

Child Safety Name: [REDACTED]

Child Safety Date: 12/15/2023

Child Safety Status: [REDACTED]

Risk Assessment

Risk ID: 1234567890

Risk Name: [REDACTED]

Risk Date: 12/15/2023

Risk Status: [REDACTED]

Risk ID: 1234567890

Risk Name: [REDACTED]

Risk Date: 12/15/2023

Risk Status: [REDACTED]

Services Recommended

Service ID: 1234567890

Service Name: [REDACTED]

Service Date: 12/15/2023

Service Status: [REDACTED]

Service ID: 1234567890

Service Name: [REDACTED]

Service Date: 12/15/2023

Service Status: [REDACTED]

Comments

Comment ID: 1234567890

Comment Name: [REDACTED]

Comment Date: 12/15/2023

Comment Status: [REDACTED]

Comment ID: 1234567890

Comment Name: [REDACTED]

Comment Date: 12/15/2023

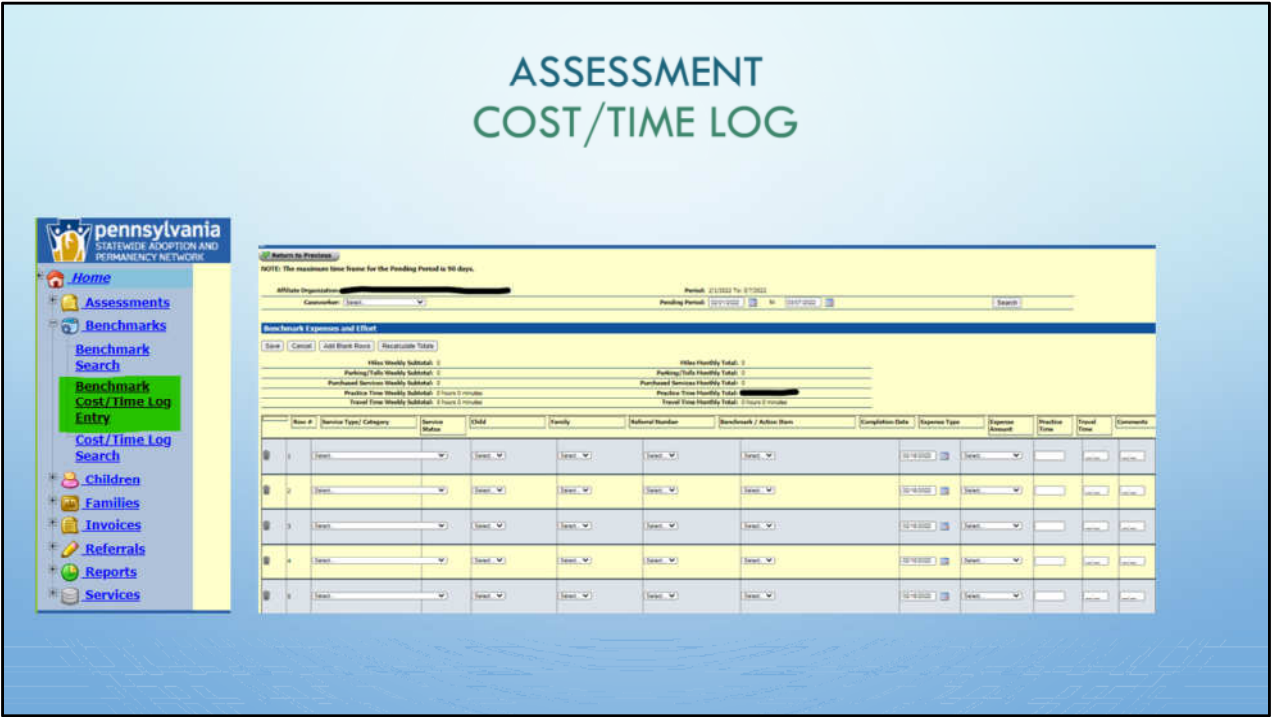
Comment Status: [REDACTED]

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 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.

ASSESSMENT
COST/TIME LOG

Row #	Service Type/Category	Service Status	Child	Family	National Number	Benchmark / Action Item	Completion Date	Expense Type	Expense Amount	Weeks Time	Hours Time	Comments
1	Adoption Evaluation Services	Open										
2	Child Protection	Open										
3	Child Welfare Management	Open										
4	Child Welfare Management or Support	Open										
5	Family Profile/Preparation or MRPP Preparation	Open										
6	Placement	Open										
7	Post-Permanency Assistance (Case Management)	Open										
8	Post-Permanency Case Management	Open										
9	Post-Permanency Support	Open										
10	Post-Permanency Support Group	Open										
11	Total											

Row #	Service Type/Category	Service Status	Child	Family	National Number	Benchmark / Action Item	Completion Date	Expense Type	Expense Amount	Weeks Time	Hours Time	Comments
1	Post-Permanency Case Management	Open										
2		Open										
3		Open										
4		Open										
5		Open										
6		Open										
7		Open										
8		Open										
9		Open										
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- Once in the Cost/Time Log:
- 1. Select the unit of service from the Service Type/Category dropdown.
 - 2. Select the Family from the dropdown.

ASSESSMENT
COST/TIME LOG

Row #	Service Type/Category	Service Status	Child	Family	Referral Number	Benchmark / Action Item	Completion Date	Expense Type	Expense Amount	Practice Time	Travel Time	Comments
1	Post-Permanency Case Assessment	Active	Child	Hess, Gregory	BH226263-242476	Select	02/16/2022	Select				
2	Select	Select	Select	Select	Select	Select	02/16/2022	Select				
3	Select	Select	Select	Select	Select	Select	02/16/2022	Select				
4	Select	Select	Select	Select	Select	Select	02/16/2022	Select				
5	Select	Select	Select	Select	Select	Select	02/16/2022	Select				

Row #	Service Type/Category	Service Status	Child	Family	Referral Number	Benchmark / Action Item	Completion Date	Expense Type	Expense Amount	Practice Time	Travel Time	Comments
1	Post-Permanency Case Assessment	Select	Select	Hess, Gregory	BH226263-242476	Select	02/16/2022	Select				
2	Select	Select	Select	Select	Select	Select	02/16/2022	Select				
3	Select	Select	Select	Select	Select	Select	02/16/2022	Select				
4	Select	Select	Select	Select	Select	Select	02/16/2022	Select				
5	Select	Select	Select	Select	Select	Select	02/16/2022	Select				

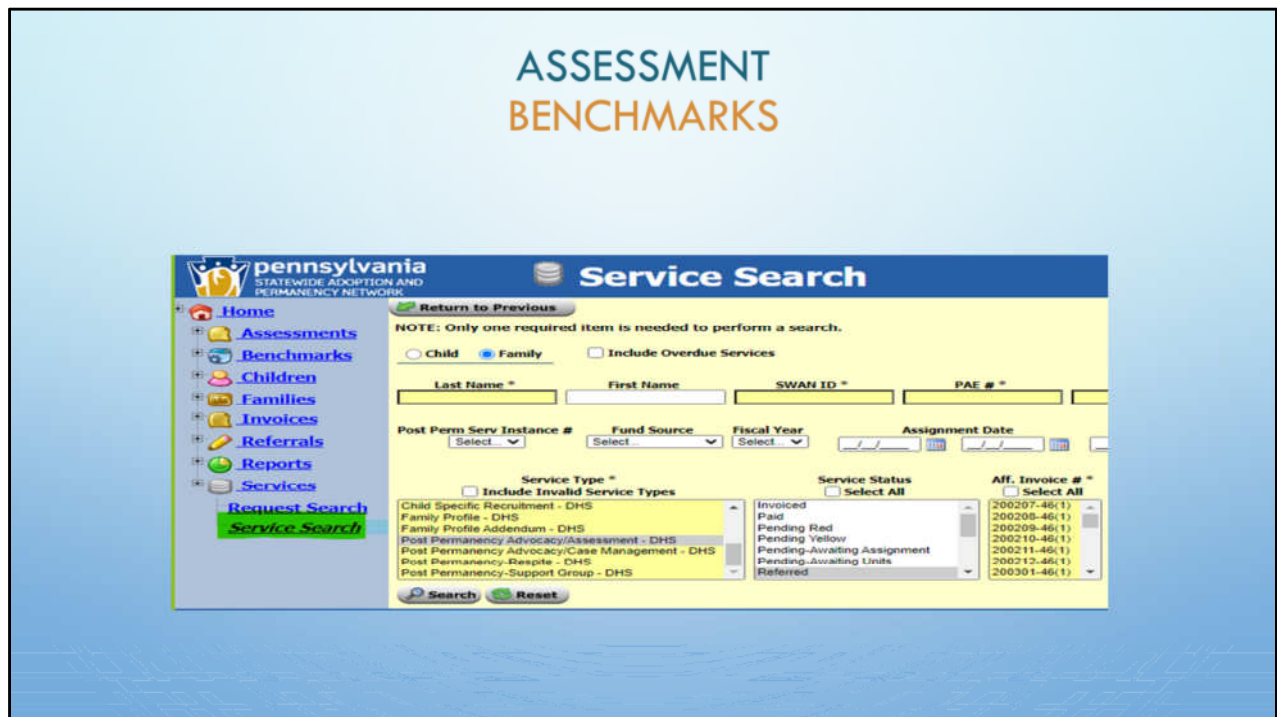
The date defaults to the day you are working in the portal. Change that to the date the action item is completed if necessary.

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.

ASSESSMENT BENCHMARKS

12 Services									
Service Type	Family Name	Child Name	Referral #	Request #	Invoice #	Service Status	Status Date	Assessment Date	Instance
Service	Post-Permanency Advocacy/Assessment (SS50.00)	Valentine, Nelson and Luke, Jr.	Prison, Lince	8H202012-242432		Referred	2/4/2022	2/4/2022	
Require	Post-Permanency Advocacy/Assessment (SS50.00)	Todd, Jennifer Lee and Quatre, Rachelle Rose	Maddox, Ronnie	8H2020125-241883		Referred	1/27/2022	1/27/2022	
Require	Post-Permanency Advocacy/Assessment (SS50.00)	Hovines, Tamika and Robb, Lee	Hall, Charle	8H202014-243251		Referred	2/16/2022	2/16/2022	
Require	Post-Permanency Advocacy/Assessment (SS50.00)	Lyons, Preston and Marie, Jonathan	Cobb, Jari	8H2020128-243152		Referred	1/31/2022	1/31/2022	

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	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	

Once the unit of service has been selected:

1. Click on the [Require](#) link.
2. Click on the [Benchmark Details](#).

ASSESSMENT
BENCHMARKS

SaveCancelSubmit

Post Permanency Case Assessment Benchmark

Benchmark Status: In Progress

Service

Service Type: Post Permanency Advocacy/AssessmentAssignment Date: 3/9/2022

Referring Agency:Assigned Affiliates: (#46)

Family

SWAN ID: F-296286AUSK ID #

Partner 1Last Name: HuntFirst Name: JeannetteMiddle Name:Date of Birth:

Partner 2Last Name: HuntFirst Name: JodyMiddle Name:Date of Birth:

Benchmark Template

	Benchmark Template	Date Completed	Updated On
UIR	RemoveCMAS		3/9/2022
UIR	RemoveChild Safety Assessment/Safety Plan		3/9/2022
UIR	RemoveFACES list		3/9/2022
UIR	RemovePR Risk Assessment		3/9/2022
UIR	RemoveParent Questionnaire		3/9/2022
UIR	RemovePost Perm Assessment Form		3/9/2022
UIR	RemovePost-Permanency Family Support Plan		3/9/2022

Add

Benchmark Expense

	Expense Type	Amount	Case Worker	Completion Date	Updated On
UIR	RemoveMiles	5.00		3/9/2022	3/9/2022

Add

Total Miles: 5Total Parking/Tolls: 0

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.

ASSESSMENT
BENCHMARKS

Primary Sort	Secondary Sort	Description															
		1. Referral															
		<u>Cost/Time Guidelines</u>															
		Cost - Include mileage, parking and/or toll expenses incurred in this step Time - Include time spent															
1	1	<ul style="list-style-type: none">Reviewing referralResearching and collecting needed additional information on familiesAssigning workerNotifying SWAN Post-perm TA and SWAN RTA if rejecting referralSending email or Phone call <ul style="list-style-type: none">Affiliate receives referral from SWAN <p><small>* SWAN Program Components, Section F - SWAN Services, 1 Direct Services, a) Post-Permanency Services</small></p>															
		<table><thead><tr><th>Practice Time (Hours/Minutes)</th><th>Travel Time (Hours/Minutes)</th><th>Completion Date</th><th>Caseworker</th><th>Comments</th></tr></thead><tbody><tr><td><div>100</div></td><td><div>015</div></td><td><div>03/09/2022</div></td><td><div>Select</div></td><td><div>traveled to family home</div></td></tr><tr><td><div>015</div></td><td><div>SelectSelect</div></td><td><div>03/09/2022</div></td><td><div>Select</div></td><td><div>left voice mail</div></td></tr></tbody></table>	Practice Time (Hours/Minutes)	Travel Time (Hours/Minutes)	Completion Date	Caseworker	Comments	<div>100</div>	<div>015</div>	<div>03/09/2022</div>	<div>Select</div>	<div>traveled to family home</div>	<div>015</div>	<div>SelectSelect</div>	<div>03/09/2022</div>	<div>Select</div>	<div>left voice mail</div>
Practice Time (Hours/Minutes)	Travel Time (Hours/Minutes)	Completion Date	Caseworker	Comments													
<div>100</div>	<div>015</div>	<div>03/09/2022</div>	<div>Select</div>	<div>traveled to family home</div>													
<div>015</div>	<div>SelectSelect</div>	<div>03/09/2022</div>	<div>Select</div>	<div>left voice mail</div>													
1	2	<ul style="list-style-type: none">Affiliate worker must accept case assessment within 5 business days of receiving referral															
		<table><thead><tr><th>Practice Time (Hours/Minutes)</th><th>Travel Time (Hours/Minutes)</th><th>Completion Date</th><th>Caseworker</th><th>Comments</th></tr></thead><tbody><tr><td></td><td></td><td><div>//</div></td><td><div>Select</div></td><td></td></tr></tbody></table>	Practice Time (Hours/Minutes)	Travel Time (Hours/Minutes)	Completion Date	Caseworker	Comments			<div>//</div>	<div>Select</div>						
Practice Time (Hours/Minutes)	Travel Time (Hours/Minutes)	Completion Date	Caseworker	Comments													
		<div>//</div>	<div>Select</div>														
1	3	<ul style="list-style-type: none">If the affiliate accepts the referral, assigned worker contacts family within 5 business days of accepting referral															
		<table><thead><tr><th>Practice Time (Hours/Minutes)</th><th>Travel Time (Hours/Minutes)</th><th>Completion Date</th><th>Caseworker</th><th>Comments</th></tr></thead><tbody><tr><td></td><td></td><td><div>//</div></td><td><div>Select</div></td><td></td></tr></tbody></table>	Practice Time (Hours/Minutes)	Travel Time (Hours/Minutes)	Completion Date	Caseworker	Comments			<div>//</div>	<div>Select</div>						
Practice Time (Hours/Minutes)	Travel Time (Hours/Minutes)	Completion Date	Caseworker	Comments													
		<div>//</div>	<div>Select</div>														

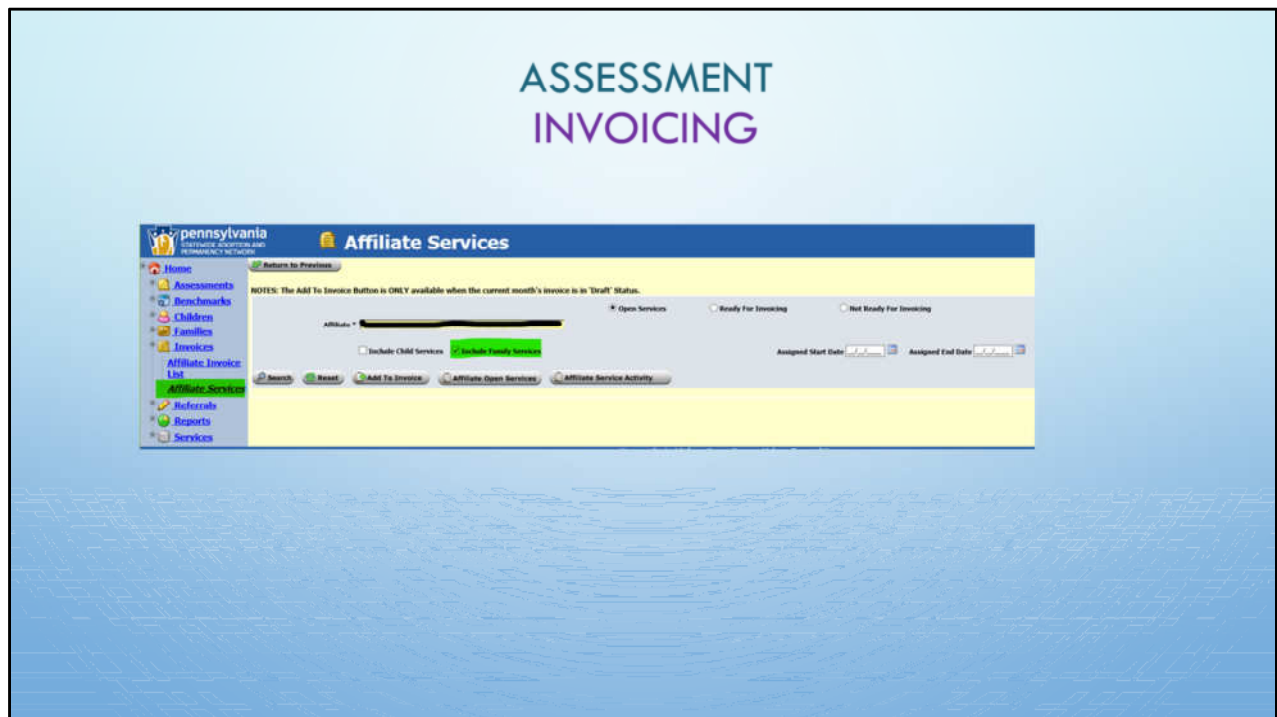
It is best practice that each worker complete their own benchmarks in order to obtain an accurate log.

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.

ASSESSMENT INVOICING

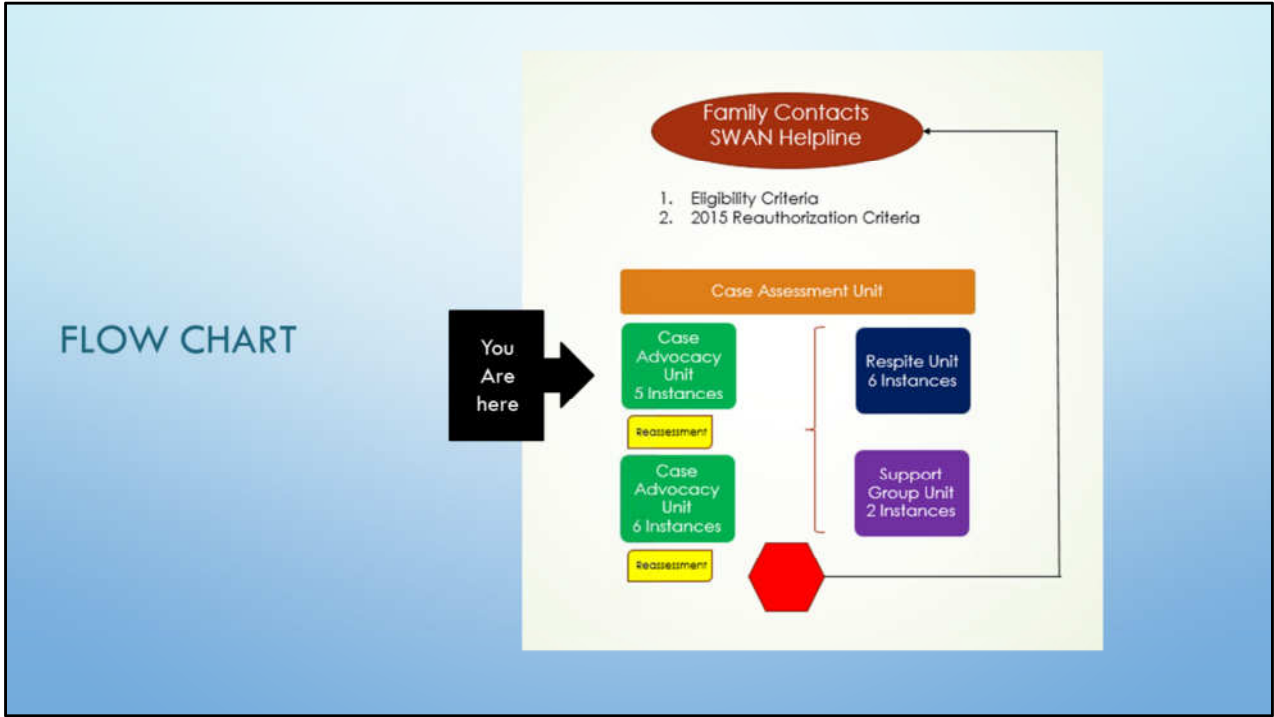
Type	Child Name	Family Name	SWAN ID	Service Type	Service Status	Assigned On	Due Date	Days To Complete	Completed On	County
Family	Walsh, Clayton	Hayward, Daryl and Stewart, Julia	F-264061	Post Permanency Advocacy/Assessment	Referred	1/3/2022	2/2/2022	-18		
Family	Hampton, Brent	Cardenas, Micah and Rush, Amanda	F-116419	Post Permanency Advocacy/Assessment	Referred	2/1/2022	3/3/2022	13		
Family	Robbins, Angie	Lara, George W and Orsco, Eva L	F-188455	Post Permanency Advocacy/Assessment	Referred	2/4/2022	3/4/2022	16		
Family	Player, Anna	Soto, Latoya Ann and Parley, Elena Michele	F-122412	Post Permanency Advocacy/Assessment	Referred	2/7/2022	3/9/2022	19		

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



WHAT IS CASE ADVOCACY?

IN BENCHMARKS

- FAMILY EDUCATION
- LOCATE HOUSING RESOURCES
- COORDINATE SYSTEMS (LEGAL, MEDICAL, EDUCATIONAL)
- LOCATE/COORDINATE MENTAL HEALTH SERVICES
- PARTICIPATE IN DISCHARGE PLANNING
- STEP DOWN FROM FAMILY BASED SERVICES
- TRAININGS/EDUCATION/CONFERENCES
- MEDICAL SERVICES LOCATION/COORDINATION
- PACA MEDIATION COORDINATION

OTHER IDEAS

- THE WORKHORSE OF POST-PERMANENCY SERVICES
- ADVOCACY
- RESOURCE COORDINATION
- CULTURAL RESOURCES
- RESPITE RESEARCH AND DEVELOPMENT
- "FAMILY GROUP"
- "LISTENING EAR"

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

CASE ADVOCACY COST/TIME LOG

pennsylvania
STATEWIDE ADOPTION AND PERMANENCY NETWORK

Home
Assessments
Benchmarks
Benchmark Search
Benchmark Cost/Time Log Entry
Cost/Time Log Search
Children
Families
Invoices
Referrals
Reports
Services

Return to Previous

NOTE: The maximum time frame for the Pending Period is 90 days.

Agency: [Redacted] Period: 12/1/2022 To 3/31/2023
Case Number: [Redacted] Pending Period: 12/1/2022 To 3/31/2023 [Search]

Benchmark Expenses and Time Log

Save Cancel Add Blank Rows Recalculate Totals

Welfare Monthly Subtotal: 0 Welfare Monthly Total: 0
 Parking/Tolls Monthly Subtotal: 0 Parking/Tolls Monthly Total: 0
 Professional Services Monthly Subtotal: 0 Professional Services Monthly Total: 0
 Practice Time Monthly Subtotal: 0 hours 0 minutes Practice Time Monthly Total: 0 hours 0 minutes
 Travel Time Monthly Subtotal: 0 hours 0 minutes Travel Time Monthly Total: 0 hours 0 minutes

Row #	Service Type/Category	Service Status	Child	Family	National Number	Benchmark / Action Item	Completion Date	Expense Amount	Expense Type	Practice Time	Travel Time	Comments
1	Travel	Travel	Travel	Travel	Travel	Travel	12/1/2022	Travel	Travel	Travel	Travel	
2	Travel	Travel	Travel	Travel	Travel	Travel	12/1/2022	Travel	Travel	Travel	Travel	
3	Travel	Travel	Travel	Travel	Travel	Travel	12/1/2022	Travel	Travel	Travel	Travel	
4	Travel	Travel	Travel	Travel	Travel	Travel	12/1/2022	Travel	Travel	Travel	Travel	
5	Travel	Travel	Travel	Travel	Travel	Travel	12/1/2022	Travel	Travel	Travel	Travel	

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.

CASE ADVOCACY
COST/TIME LOG

Row #	Service Type / Category	Service Status	Child	Family	Referral Number	Benchmark / Action Item	Completion Date	Expense Type	Expense Amount	Practice Time	Travel Time	Comments
1	Post-Permanency Advocacy											
2												
3												
4												
5												

Row #	Service Type / Category	Service Status	Child	Family	Referral Number	Benchmark / Action Item	Completion Date	Expense Type	Expense Amount	Practice Time	Travel Time	Comments
1	Post-Permanency Advocate / Case M			Adcock, Eli / O'Connell, Martin			01/01/2022					
2				Allison, Candice / Crosby, Meredith			01/01/2022					
3				Andrews, Xavier / Perkins, Roland			01/01/2022					
4				Arise, Earnest			01/01/2022					
				Atkinson, Javier / Gardner, Byron			01/01/2022					
				Avery, Shanti / Dougherty, Kirsten			01/01/2022					
				Ayers, Angel / Beck, Taryn			01/01/2022					
				Barnes, Emily / Newman, Kamela			01/01/2022					
				Bates, Peter / Wang, Brooke			01/01/2022					
				Bauer, Enrique / Cochran, Whitney			01/01/2022					
				Beal, Jim / Jacobs, Leanne			01/01/2022					
				Bentley, Helen / Ponce, Lennie			01/01/2022					
				Benson, Gail / Salinas, Maggie			01/01/2022					
				Bentley, Brandon / Mosley, Edward			01/01/2022					
				Berg, Helen / Mac Donald, Fred			01/01/2022					
				Best, Raymond / Wilson, Donna			01/01/2022					
				Blackburn, Elizabeth / Carter, Elena			01/01/2022					
				Blackwell, Jody / Dean, Jessica			01/01/2022					
				Brown, Ray / Cobb, Thane			01/01/2022					

- Once in the Cost/Time Log:
- 1. Select the unit of service from the Service Type/Category dropdown.
 - 2. Select the Family from the dropdown.

CASE ADVOCACY
COST/TIME LOG

Row #	Service Type/ Category	Service Status	Child	Family	Referral Number	Benchmark / Action Item	Completion Date	Expense Type	Expense Amount	Practice Time	Travel Time	Comments
1	Post Permanency Advocate / Case M/Referral	Select...	Select...	Barron, Emily / Newman, J	RH211129-230209	Select... 1.1-1 ReferralCost/Time GuidelinesCost - Include mileage, parking and/or toll expenses incurred in... 2.1-2 Initial ContactCost/Time GuidelinesCost - Include mileage, parking and/or toll expenses inc... 3.1-3 Post-Permanency Support Plan and ActivitiesCost/Time GuidelinesCost - Include mileage, park... 4.1-4 ReassessmentCost/Time GuidelinesCost - Include mileage, parking and/or toll expenses inc... 5.1-5 Completion of Case Advocacy UnitCost/Time GuidelinesCost - Include mileage, parking and/o...	02/21/2022	Select...				
2	Select...	Select...	Select...	Select...	Select...	Select...	02/21/2022	Select...				
3	Select...	Select...	Select...	Select...	Select...	Select...	02/21/2022	Select...				

Row #	Service Type/ Category	Service Status	Child	Family	Referral Number	Benchmark / Action Item	Completion Date	Expense Type	Expense Amount	Practice Time	Travel Time	Comments
1	Post Permanency Advocate / Case M/Referral	Select...	Select...	Barron, Emily / Newman, J	RH211129-230209	Select...	02/21/2022	Select... Miles Parking/Tolls				
2	Select...	Select...	Select...	Select...	Select...	Select...	02/21/2022	Select...				
3	Select...	Select...	Select...	Select...	Select...	Select...	02/21/2022	Select...				

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.

CASE ADVOCACY BENCHMARKS

Service Search

[Return to Previous](#)

NOTE: Only one required item is needed to perform a search.

☐ Child ☒ Family ☐ Include Overdue Services

Last Name * First Name SWAN ID * PAE # * Referral # *

Post Perm Serv Instance # Fund Source Fiscal Year Assignment Date

Service Type * ☐ Include Invalid Service Types

Service Status ☐ Select All

Aff. Invoice # * ☐ Select All

Child Specific Recruitment - DHS
Family Profile - DHS
Family Profile Addendum - DHS
Post Permanency Advocacy/Assessment - DHS
Post Permanency Advocacy/Case Management - DHS
Post Permanency-Respite - DHS
Post Permanency-Support Group - DHS

Invoiced
Paid
Pending Red
Pending Yellow
Pending-Awaiting Assignment
Pending-Awaiting Units
Referred

200207-46(1)
200208-46(1)
200209-46(1)
200210-46(1)
200211-46(1)
200212-46(1)
200301-46(1)

[Search](#) [Reset](#)

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

CASE ADVOCACY BENCHMARKS

Service Type	Family Name	Child Name	Referral #	Request #	Invoice #	Service Status	Status Date	Assignment Date	Instance
Require Post-Permanency Advocacy/Case Management (\$500.00)	Allison, Candice and Crosby, Meredith	Luna, Maureen	BH220127-242039			Referred	1/31/2022	1/31/2022	1
Require Post-Permanency Advocacy/Case Management (\$500.00)	Allison, Candice and Crosby, Meredith	Luna, Maureen	BH220127-242039			Referred	1/31/2022	1/31/2022	2
Require Post-Permanency Advocacy/Case Management (\$500.00)	Allison, Candice and Crosby, Meredith	Luna, Maureen	BH220127-242039			Referred	1/31/2022	1/31/2022	3
Require Post-Permanency Advocacy/Case Management (\$500.00)	Allison, Candice and Crosby, Meredith	Luna, Maureen	BH220127-242039			Referred	1/31/2022	1/31/2022	4

Service on Existing Request (Withdrawal, Void, or Invoice in Error): No

Service Status = Referred: Yes

Benchmarks Completed: Not Required [Benchmark Details](#)

County Certification Completed: Not Required [Certification Details](#)

CY131 Family Registration Completed: Not Required [Family Details](#)

Family Profile Completed (Synopsis): Not Required [Family Synopsis](#)

Family Approval Document: Not Required [Family Approval Document](#)

Assessment Completed: Yes [Assessment Details](#)

6 Month Review Completed: Not Required [Review Details](#)

Service Cannot Be Invoiced Until: 1/31/2022 9:30:43 AM

Once the unit of service has been selected:

1. Click on the [Require](#) link.
2. Click on the [Benchmark Details](#).

CASE ADVOCACY
BENCHMARKS

SaveCancelSubmit

Post Permanency Advocate / Case Management Benchmark

Benchmark Status: In Progress

Service:

Service Type: Post Permanency Advocacy/Case ManagementAssignment Date: 3/7/2022

Referring Agency:Assignment Affiliation:

Child:

SWAN ID: C-35326DMS #:PAE #:

Last Name: VillalFirst Name: MelissaMiddle Name:Date Of Birth:

Family:

SWAN ID: F-229112AUMK ID #:

Partner 1:

Last Name: HinoFirst Name: DylanMiddle Name:Date of Birth:

Partner 2:

Last Name: DayFirst Name: JosephMiddle Name:Date of Birth:

Benchmark Template:

		Date Completed	Updated On
0.00	Estimate	2022 Revised Authorization Protocol	3/7/2022
0.00	Estimate	Assessment Form	3/7/2022
0.00	Estimate	CAFAS	3/7/2022
0.00	Estimate	Child Safety Assessment Update	3/7/2022
0.00	Estimate	Child Safety Assessment/Safety Plan	3/7/2022
0.00	Estimate	FACETS ID	3/7/2022
0.00	Estimate	Home Safety Assessment	3/7/2022
0.00	Estimate	PA Risk Assessment	3/7/2022
0.00	Estimate	Parent Questionnaire	3/7/2022
0.00	Estimate	Supportive Service Monthly Report	3/7/2022

Benchmark Estimate:

	Expense Type	Amount	Completion Date	Updated On
0.00	Estimate	Honor	3/7/2022	3/7/2022
0.00	Estimate	Per Diem/Trip	3/7/2022	3/7/2022

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

CASE ADVOCACY
BENCHMARKS

Primary Sort	Secondary Sort	Description	Practice Time (Hours/Minutes)	Travel Time (Hours/Minutes)	Completion Date	Caseworker	Comments
		I. Referral					
		Cost/Time Guidelines					
		Cost - Include mileage, parking and/or toll expenses incurred in this step					
		Time - Include time spent					
		<ul style="list-style-type: none">Reviewing referralAssigning workerResearching and collecting needed additional information on familiesNotifying SWAN Post-perm TA and SWAN KTA if rejecting referral Sending email or Phone call					
		<ul style="list-style-type: none">Affiliate receives referral from SWAN					
		<small>*SWAN Program Components, Section 91, 200M) Services, 11 Direct Services, 41 Post-Permanency Services, Advocate for Post-Permanency Services</small>					
			0 30	Select Select	03/09/2022	Select	Home visit
			Select Select	0 50	03/09/2022	Select	Home visit
			0 15	Select Select	03/09/2022	Select	left voice mail
			0 15	Select Select	03/09/2022	Select	received and reviewed referral
		<ul style="list-style-type: none">Mediation services for post-adoption contact agreements, PACA, can be delivered under this unit of service					
		<ul style="list-style-type: none">Affiliate worker must accept case advocacy within 5 business days of receiving referral					

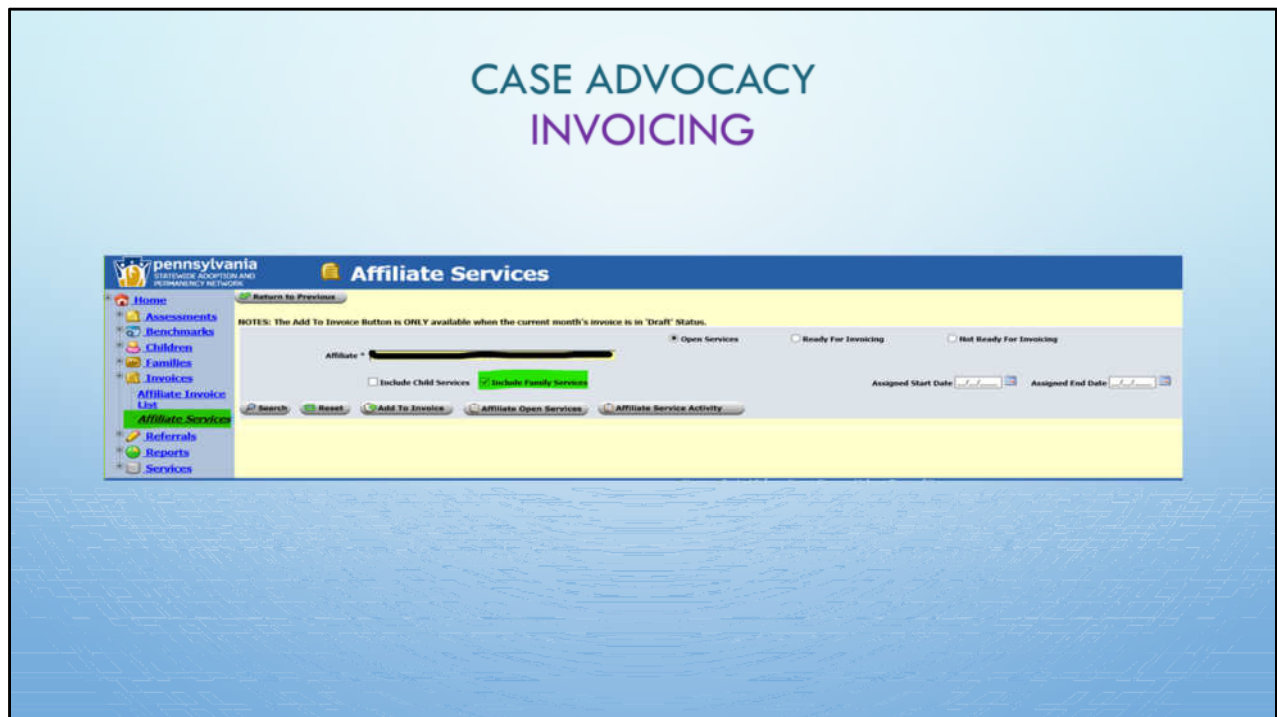
It is best practice that each worker complete their own benchmarks in order to obtain an accurate log.

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.

CASE ADVOCACY INVOICING										
Type	Child Name	Family Name	SWAN ID	Service Type	Service Status	Assigned On	Due Date	Days To Complete	Completed On	County
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency Advocacy/Case Management	Referred	12/28/2021	2/26/2022	8		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency Advocacy/Case Management	Referred	12/28/2021	3/28/2022	38		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency Advocacy/Case Management	Referred	12/28/2021	4/27/2022	68		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency Advocacy/Case Management	Referred	12/28/2021	5/27/2022	98		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Respite	Referred	12/28/2021	1/27/2022	-32		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Respite	Referred	12/28/2021	2/26/2022	8		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Respite	Referred	12/28/2021	3/28/2022	38		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Respite	Referred	12/28/2021	4/27/2022	68		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Respite	Referred	12/28/2021	5/27/2022	98		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Respite	Referred	12/28/2021	6/26/2022	128		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Support Group	Referred	1/27/2022	7/26/2022	158		

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





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

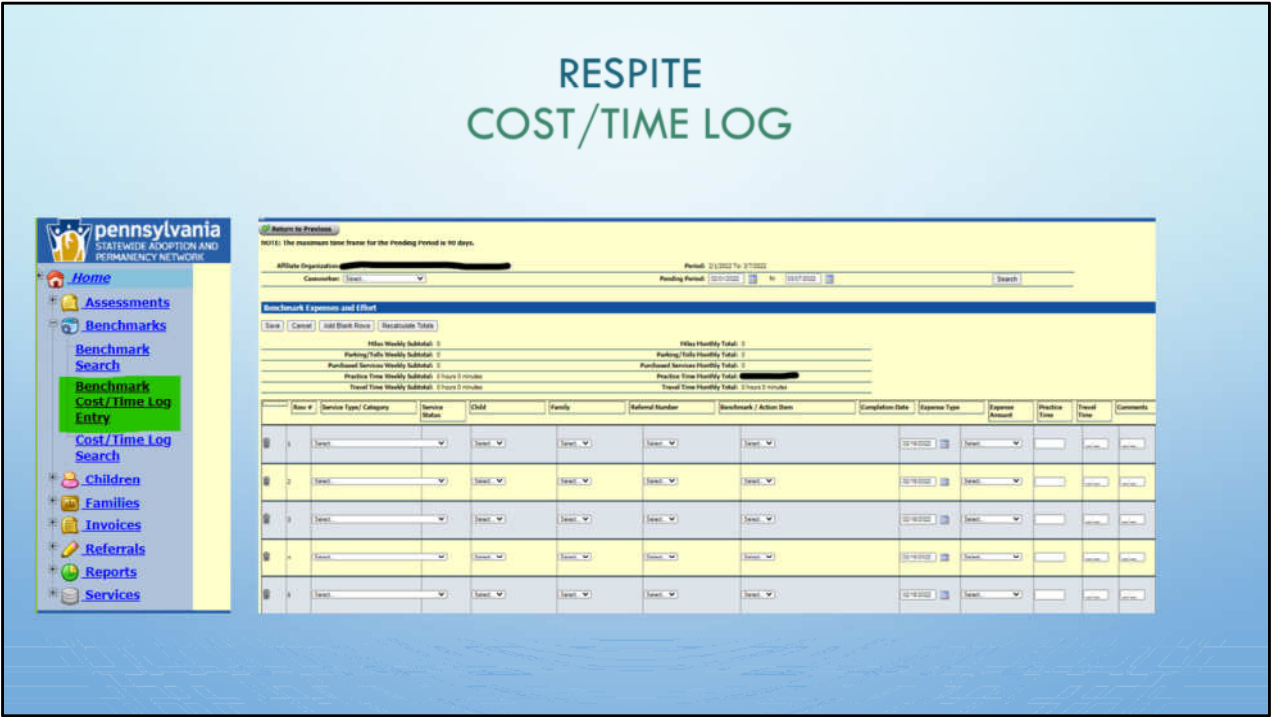
These are some examples of what can be accomplished during the respite unit.

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.

RESPITE
COST/TIME LOG

Row #	Service Type/ Category	Service Status	Child	Family	Referral Number	Benchmark / Action Item	Completion Date	Expense Type	Expense Amount	Practice Time	Travel Time	Comments	
1	<div><div>Select</div><div>Adoption Finalization Extension</div><div>Child Preparation</div><div>Child Profile</div><div>Child Profile Addendum</div><div>Child Specific Recruitment</div><div>Family Profile/Preparation or ARFP</div><div>Family Profile/Preparation or ARFP Addendum</div><div>Finalization</div><div>Placement</div><div>Post Permanency Advocate / Case Management</div><div>Post Permanency Case Assessment</div><div>Post Permanency Respite</div><div>Post Permanency Support Group</div><div>Other</div></div>		<div>Select</div>	<div>Select</div>	<div>Select</div>	<div>Select</div>	<div>02/21/2022</div>	<div>Select</div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
2	<div>Select</div>		<div>Select</div>	<div>Select</div>	<div>Select</div>	<div>Select</div>	<div>02/21/2022</div>	<div>Select</div>	<div></div>	<div></div>	<div></div>	<div></div>	
3	<div>Select</div>		<div>Select</div>	<div>Select</div>	<div>Select</div>	<div>Select</div>	<div>02/21/2022</div>	<div>Select</div>	<div></div>	<div></div>	<div></div>	<div></div>	

Row #	Service Type/ Category	Service Status	Child	Family	Referral Number	Benchmark / Action Item	Completion Date	Expense Type	Expense Amount	Practice Time	Travel Time	Comments
1	<div>Post Permanency Respite</div>	<div>Referred</div>	<div>Select</div>	<div><div>Select</div><div>Adison, Candice / Crosby, Meredith</div><div>Avery, Shanti / Dougherty, Kristen</div><div>Barnes, Emily / Newman, Amelia</div><div>Bates, Peter / Vang, Brooke</div><div>Bauer, Enrique / Cochran, Whitney</div><div>Beck, Jim / Jacobs, Leanne</div><div>Benson, Gail / Selman, Maggie</div><div>Bentley, Brandon / Manney, Edward</div><div>Berg, Helen / Mac Donald, Fred</div><div>Blackwell, Judy / Dean, Jessica</div><div>Carrillo, Crystal / Pineda, Albert</div><div>Cate, Marilyn / Guerra, Jeanette</div><div>Carey, Gene</div><div>Castro, Oscar</div></div>	<div>Select</div>	<div>02/21/2022</div>	<div>Select</div>	<div></div>	<div></div>	<div></div>	<div></div>	
2	<div>Select</div>		<div>Select</div>	<div>Select</div>	<div>Select</div>	<div>Select</div>	<div>02/21/2022</div>	<div>Select</div>	<div></div>	<div></div>	<div></div>	<div></div>
3	<div>Select</div>		<div>Select</div>	<div>Select</div>	<div>Select</div>	<div>Select</div>	<div>02/21/2022</div>	<div>Select</div>	<div></div>	<div></div>	<div></div>	<div></div>

- Once in the Cost/Time Log:
- 1. Select the unit of service from the Service Type/Category dropdown.
 - 2. Select the Family from the dropdown.

RESPITE
COST/TIME LOG

Row #	Service Type/ Category	Service Status	Child	Family	Referral Number	Benchmark / Action Item	Completion Date	Expense Type	Expense Amount	Practice Time	Travel Time	Comments
1	Post-Permanency Respite	Referred	Select...	Bauer, Enrique Cochran	R0211006-238418	1.1-1. Initial Contact/Time GuidelinesCost - Include mileage, parking and/or toll expenses incurred. 2.1-2. Initial Contact/Time GuidelinesCost - Include mileage, parking and/or toll expenses inc. 2.1-3. Post-permanency Respite Plan and ScheduleCost/Time GuidelinesCost - Include mileage, park. 4.1-4. ReassessmentCost/Time GuidelinesCost - Include mileage, parking and/or toll expenses incur. 5.1-5. Completion of Respite UseCost/Time GuidelinesCost - Include mileage, parking and/or tol. Select...	02/01/2022	Select...				
2	Select...		Select...	Select...	Select...	Select...	02/01/2022	Select...				
3	Select...		Select...	Select...	Select...	Select...	02/01/2022	Select...				

Row #	Service Type/ Category	Service Status	Child	Family	Referral Number	Benchmark / Action Item	Completion Date	Expense Type	Expense Amount	Practice Time	Travel Time	Comments
1	Post-Permanency Respite	Referred	Select...	Bauer, Enrique Cochran	R0211006-238418	2.1-2. Initial Contact/Time GuidelinesCost - Include Select...	02/01/2022	Select...				
2	Select...		Select...	Select...	Select...	Select...	02/01/2022	Select...				
3	Select...		Select...	Select...	Select...	Select...	02/01/2022	Select...				

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

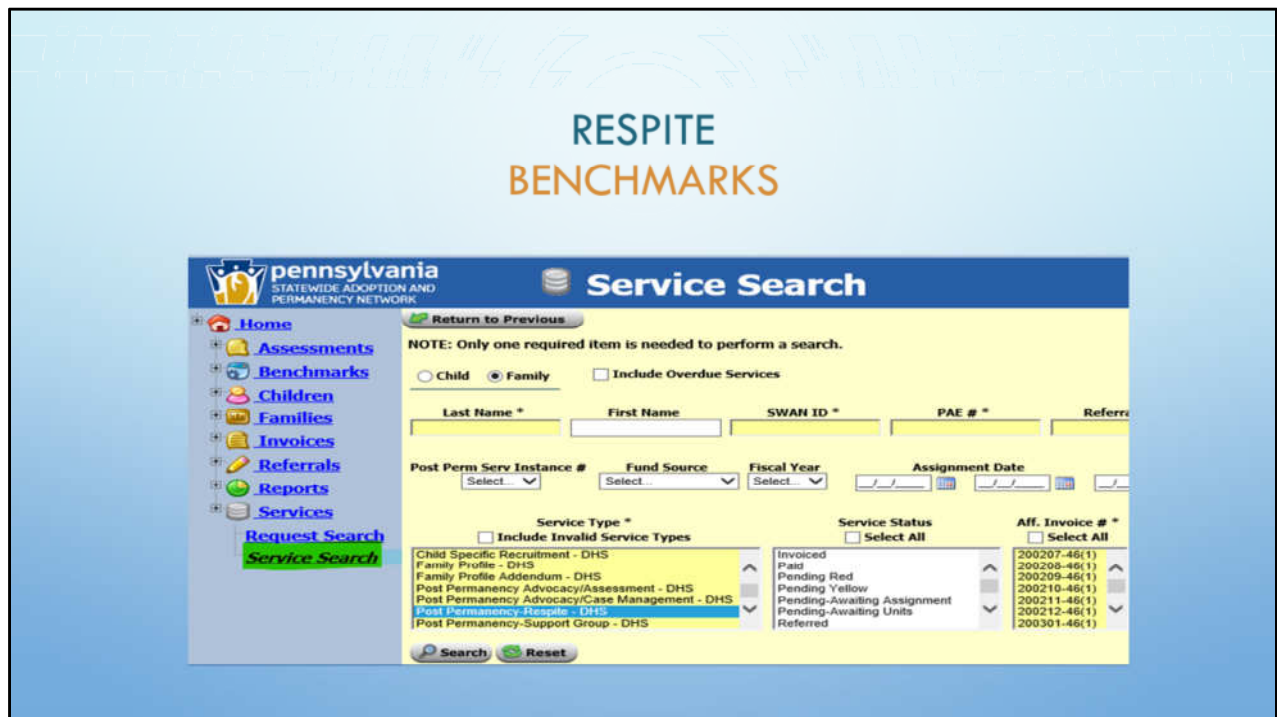
***Make sure for Respite Cost/Time Logs that you are indicating purchased services to include the amount of money reimbursed to the family.**

- 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

RESPITE
BENCHMARKS

Page 1 of 179

Service Type

Family Name

Child Name

Referral #

Request #

Invoice #

Service Status

Status Date

Assignment Date

Instance

Require	Post Permanency-Respite (\$200.00)	Abbott, Karl and Burton, Hector	Mc.Neil, Joyce	RH161021-122259	201701-0046	Paid	2/21/2017	10/28/2016	1
Require	Post Permanency-Respite (\$200.00)	Abbott, Karl and Burton, Hector	Mc.Neil, Joyce	RH161021-122259	201701-0046	Paid	2/21/2017	10/28/2016	2
Require	Post Permanency-Respite (\$200.00)	Abbott, Karl and Burton, Hector	Mc.Neil, Joyce	RH161021-122259	201701-0046	Paid	2/21/2017	10/28/2016	3
Require	Post Permanency-Respite (\$200.00)	Abbott, Karl and Burton, Hector	Mc.Neil, Joyce	RH161021-122259	201702-0046	Paid	3/20/2017	10/28/2016	4

Service on Existing Request (Withdrawal, Void, or Invoice in Error): No

Service Status = Referred: No

Benchmarks Completed: Yes

County Certification Completed: Not Required

CY131 Family Registration Completed: Not Required

Family Profile Completed (Synopsis): Not Required

Family Approval Document: Not Required

Assessment Completed: Yes

6 Month Review Completed: Yes

Service Cannot Be Invoiced Until: 10/28/2016 9:35:08 AM

Benchmark Details

Certification Details

Family Details

Family Synopsis

Family Approval Document

Assessment Details

Review Details

Once the unit of service has been selected:

- 1. Click on the Require link.
- 2. Click on the Benchmark Details.

Cost/Time Log, Benchmarks & Invoicing Guide

41

RESPITE
BENCHMARKS

Save Cancel Submit

Post Permanency Respite Benchmark

Benchmark Status: In Progress

Service

Service Type: Post Permanency-Respite

Assignment Date: 3/7/2022

Referring Agency: [Redacted]

Assignee: [Redacted]

Family

SWAN ID: F-276133

ADPK ID #

Partner 1

Last Name: [Redacted]

First Name: [Redacted]

Middle Name: [Redacted]

Date of Birth: [Redacted]

Partner 2

Last Name: [Redacted]

First Name: [Redacted]

Middle Name: [Redacted]

Date of Birth: [Redacted]

Benchmark Template

	Benchmark Template	Date Completed	Updated On
Edit Remove	2022 Revised Authorization Protocol		3/7/2022
Edit Remove	Assessment Form		3/7/2022
Edit Remove	CAPAS Site		3/7/2022
Edit Remove	Child Safety Assessment Update		3/7/2022
Edit Remove	Child Safety Assessment/Safety Plan		3/7/2022
Edit Remove	FACE3 02		3/7/2022
Edit Remove	Home Safety Assessment		3/7/2022
Edit Remove	Risk Assessment		3/7/2022
Edit Remove	Parent Questionnaire		3/7/2022
Edit Remove	Respite Event Report		3/7/2022

1 2

Add

Benchmark Expense

	Expense Type	Amount	Contributor	Completion Date	Updated On
Edit Remove	Mileage	25.00	[Redacted]	3/9/2022	3/9/2022
Edit Remove	Respite Services	100.00	[Redacted]	3/9/2022	3/9/2022
Edit Remove	Respite Services	300.00	[Redacted]	3/9/2022	3/9/2022

Add

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

RESPITE
BENCHMARKS

Primary Sort	Secondary Sort	Description																									
		1. Referral																									
		Cost/Time Guidelines																									
		Cost - Include mileage, parking and/or toll expenses incurred in this step Time - Include time spent																									
		<ul style="list-style-type: none">Reviewing referralResearching and collecting needed additional information on familiesAssigning workerNotifying SWAN Post-perm TA and SWAN RTA if rejecting referral<ul style="list-style-type: none">Sending email or Phone call																									
		<ul style="list-style-type: none">Affiliate receives referral from SWAN																									
		<small>* SWAN Process Comments, Section C: SWAN Services, 41 Direct Services, 43 Post-Permanency Services, Respite</small>																									
		<table><thead><tr><th>Practice Time (Hours/Minutes)</th><th>Travel Time (Hours/Minutes)</th><th>Completion Date</th><th>Caseworker</th><th>Comments</th></tr></thead><tbody><tr><td><div><div>0</div><div>15</div></div></td><td><div>Select</div><div>Select</div></td><td><div>03/09/2022</div></td><td><div>Select</div></td><td><div>reviewed referral</div></td></tr><tr><td><div><div>0</div><div>15</div></div></td><td><div>Select</div><div>Select</div></td><td><div>03/09/2022</div></td><td><div>Select</div></td><td><div>reviewed referral</div></td></tr><tr><td><div><div>0</div><div>15</div></div></td><td><div>Select</div><div>Select</div></td><td><div>03/09/2022</div></td><td><div>Select</div></td><td><div>it is family to schedule, but</div></td></tr><tr><td><div><div>0</div><div>15</div></div></td><td><div>Select</div><div>Select</div></td><td><div>03/09/2022</div></td><td><div>Select</div></td><td><div>reviewed referral</div></td></tr></tbody></table>	Practice Time (Hours/Minutes)	Travel Time (Hours/Minutes)	Completion Date	Caseworker	Comments	<div><div>0</div><div>15</div></div>	<div>Select</div> <div>Select</div>	<div>03/09/2022</div>	<div>Select</div>	<div>reviewed referral</div>	<div><div>0</div><div>15</div></div>	<div>Select</div> <div>Select</div>	<div>03/09/2022</div>	<div>Select</div>	<div>reviewed referral</div>	<div><div>0</div><div>15</div></div>	<div>Select</div> <div>Select</div>	<div>03/09/2022</div>	<div>Select</div>	<div>it is family to schedule, but</div>	<div><div>0</div><div>15</div></div>	<div>Select</div> <div>Select</div>	<div>03/09/2022</div>	<div>Select</div>	<div>reviewed referral</div>
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<div><div>0</div><div>15</div></div>	<div>Select</div> <div>Select</div>	<div>03/09/2022</div>	<div>Select</div>	<div>reviewed referral</div>																							
		<ul style="list-style-type: none">Affiliate worker must accept respite referral within 5 business days of receiving referral																									
		<table><thead><tr><th>Practice Time (Hours/Minutes)</th><th>Travel Time (Hours/Minutes)</th><th>Completion Date</th><th>Caseworker</th><th>Comments</th></tr></thead><tbody><tr><td></td><td></td><td><div>03/09/2022</div></td><td><div>Select</div></td><td></td></tr></tbody></table>	Practice Time (Hours/Minutes)	Travel Time (Hours/Minutes)	Completion Date	Caseworker	Comments			<div>03/09/2022</div>	<div>Select</div>																
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		<div>03/09/2022</div>	<div>Select</div>																								
		<ul style="list-style-type: none">If the affiliate accepts referral, assigned worker contacts family within 5 business days of accepting referral																									
		<table><thead><tr><th>Practice Time (Hours/Minutes)</th><th>Travel Time (Hours/Minutes)</th><th>Completion Date</th><th>Caseworker</th><th>Comments</th></tr></thead><tbody><tr><td></td><td></td><td><div>03/09/2022</div></td><td><div>Select</div></td><td></td></tr></tbody></table>	Practice Time (Hours/Minutes)	Travel Time (Hours/Minutes)	Completion Date	Caseworker	Comments			<div>03/09/2022</div>	<div>Select</div>																
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		<div>03/09/2022</div>	<div>Select</div>																								

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.

RESPIRE INVOICING

The screenshot shows the 'Affiliate Services' page in the SWAN system. The left sidebar contains a navigation menu with options: Home, Assessments, Benchmarks, Children, Families, Invoices, Affiliate Invoice List, **Affiliate Services**, Referrals, Reports, and Services. The main content area has a blue header with the 'Affiliate Services' title. Below the header, there is a 'Return to Previous' button and a note: 'NOTE: The Add To Invoice Button is ONLY available when the current month's invoice is in 'Draft' Status.' There are three radio buttons for service status: 'Open Services' (selected), 'Ready For Invoicing', and 'Not Ready For Invoicing'. Below these, there is a search bar with a dropdown menu for 'Affiliate' and two checkboxes: 'Include Child Services' and 'Include Family Services' (checked). At the bottom, there are buttons for 'Search', 'Reset', 'Add To Invoice', 'Affiliate Open Services', and 'Affiliate Service Activity'. There are also fields for 'Assigned Start Date' and 'Assigned End Date'.

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.

RESPITE INVOICING

Type	Child Name	Family Name	SWAN ID	Service Type	Service Status	Assigned On	Start Date	Days To Complete	Completed On	County
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency Advocacy/Case Management	Referred	12/28/2021	2/26/2022	8		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency Advocacy/Case Management	Referred	12/28/2021	3/28/2022	38		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency Advocacy/Case Management	Referred	12/28/2021	4/27/2022	68		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency Advocacy/Case Management	Referred	12/28/2021	5/27/2022	98		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Respite	Referred	12/28/2021	1/27/2022	-22		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Respite	Referred	12/28/2021	2/26/2022	8		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Respite	Referred	12/28/2021	3/28/2022	38		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Respite	Referred	12/28/2021	4/27/2022	68		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Respite	Referred	12/28/2021	5/27/2022	98		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Respite	Referred	12/28/2021	6/26/2022	128		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Support Group	Referred	1/27/2022	7/26/2022	158		

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.

RESPIRE QUESTIONS



SUPPORT GROUP





These are some examples of support groups.

SUPPORT GROUP COST/TIME LOG

The screenshot displays the SWAN portal interface. On the left is a navigation menu with links: Home, Assessments, Benchmarks, Benchmark Search, Benchmark Cost/Time Log Entry (highlighted in green), Cost/Time Log Search, Children, Families, Invoices, Referrals, Reports, and Services. The main content area is titled 'Benchmark Expenses and Effort'. It includes a 'Return to Previous' link, a note about the 90-day pending period, and a search bar. Below this is a 'Benchmark Expenses and Effort' section with tabs for 'Data', 'Cancel', 'Add New Row', and 'Monthly Totals'. The 'Data' tab is active, showing a table with columns: Row #, Service Type/Category, Service Status, Child, Family, Referral Number, Benchmark / Action Item, Completion Date, Expense Type, Expense Amount, Pending Time, Actual Time, and Comments. The table contains five rows of data, each with a '1' in the 'Row #' column and a '1' in the 'Service Type/Category' column. The 'Expense Amount' column shows values like 10.00, 10.00, 10.00, 10.00, and 10.00. The 'Pending Time' and 'Actual Time' columns are empty.

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.

SUPPORT GROUP
COST/TIME LOG

Row #	Service Type/ Category	Service Status	Child	Family	Referral Number	Benchmark / Action Item	Completion Date	Expense Type	Expense Amount	Practice Time	Travel Time	Comments	
1	<div>Select Adoption Finalization Extension Child Preparation Child Profile Child Profile Addendum Child Specific Recruitment Family Profile/Preparation or ARFP Family Profile/Preparation or ARFP Addendum Finalization Placement Post Permanency Advocate / Case Management Post Permanency Case Assessment Post Permanency Respite Post Permanency Support Group Other</div>		<div></div>	<div></div>	<div></div>	<div></div>	02/01/2022	<div>Select</div>					
2			<div>Select</div>	<div>Select</div>	<div>Select</div>	<div>Select</div>	02/01/2022	<div>Select</div>					
3			<div>Select</div>	<div>Select</div>	<div>Select</div>	<div>Select</div>	02/01/2022	<div>Select</div>					

Row #	Service Type/ Category	Service Status	Child	Family	Referral Number	Benchmark / Action Item	Completion Date	Expense Type	Expense Amount	Practice Time	Travel Time	Comments
1	Post Permanency Support Group	Referral	<div>Select</div>	<div>Select</div>		<div>Select</div>	02/01/2022	<div>Select</div>				
2	<div>Select</div>		<div>Select</div>	<div>Select</div>		<div>Select</div>	02/01/2022	<div>Select</div>				
3	<div>Select</div>		<div>Select</div>	<div>Select</div>		<div>Select</div>	02/01/2022	<div>Select</div>				

- Once in the Cost/Time Log:
- 1. Select the unit of service from the Service Type/Category dropdown.
 - 2. Select the Family from the dropdown.

SUPPORT GROUP
COST/TIMELOG

Row #	Service Type/ Category	Service Status	Child	Family	Referral Number	Benchmark / Action Item	Completion Date	Expense Type	Expense Amount	Practice Time	Travel Time	Comments
1	Post Permanency Support Group	Referred	Select...	Bauer, Enrique Cochran	RH211006-236418	Select... 1.1 - 1. ReferralCost/Time GuidelinesCost - include mileage, parking and/or toll expenses incurred... 2.1 - 2. Initial ContactCost/Time GuidelinesCost - include mileage, parking and/or toll expenses inc... 3.1 - 3. Post-permanency Support Group ActivitiesCost/Time GuidelinesCost - include mileage, parking... 4.1 - 4. ReassessmentCost/Time GuidelinesCost - include mileage, parking and/or toll expenses incur... 5.1 - 5. Completion of Support Group UnitCost/Time GuidelinesCost - include mileage, parking and...	03/21/2022	Select...				
2	Select...		Select...	Select...	Select...	Select...	03/21/2022	Select...				
3	Select...		Select...	Select...	Select...	Select...	03/21/2022	Select...				

Row #	Service Type/ Category	Service Status	Child	Family	Referral Number	Benchmark / Action Item	Completion Date	Expense Type	Expense Amount	Practice Time	Travel Time	Comments
1	Post Permanency Support Group	Referred	Select...	Bauer, Enrique Cochran	RH211006-236418	2.1 - 2. Initial ContactCost/Time GuidelinesCost - Inche	03/21/2022	Select... Miles Parking/Tolls				
2	Select...		Select...	Select...	Select...	Select...	03/21/2022	Select...				
3	Select...		Select...	Select...	Select...	Select...	03/21/2022	Select...				

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.

SUPPORT GROUP BENCHMARKS

Service Search

Return to Previous

NOTE: Only one required item is needed to perform a search.

☐ Child ☒ Family ☐ Include Overdue Services

Last Name * First Name SWAN ID * PAE # * Referral

Post Perm Serv Instance # Fund Source Fiscal Year Assignment Date

Select... Select... Select... / / /

Service Type * ☐ Include Invalid Service Types

Child Specific Recruitment - DHS
Family Profile - DHS
Family Profile Addendum - DHS
Post Permanency Advocacy/Assessment - DHS
Post Permanency Case Management - DHS
Post Permanency Respite - DHS
Post Permanency Support Group - DHS

Service Status ☐ Select All

Invoiced
Paid
Pending Red
Pending Yellow
Pending-Awaiting Assignment
Pending-Awaiting Units
Withdrawn

Aff. Invoice # * ☐ Select All

200207-46(1)
200208-46(1)
200209-46(1)
200210-46(1)
200211-46(1)
200212-46(1)
200301-46(1)

Search **Reset**

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.

SUPPORT GROUP
BENCHMARKS

Service Type	Family Name	Child Name	Referral #	Request #	Invoice #	Service Status	Status Date	Assignment Date	Instance
Require Post Permanency-Support Group (\$250.00)	Meyers, Whitney and Moss, Sharon	Branch, Daniel	89520131-242211			Referred	2/1/2022	2/1/2022	1
Require Post Permanency-Support Group (\$250.00)	Meyers, Whitney and Moss, Sharon	Branch, Daniel	89520131-242211			Referred	2/1/2022	2/1/2022	2

Service on Existing Request (Withdrawal, Void, or Invoice in Error): No

Service Status = Referred: Yes

Benchmarks Completed: Not Required

County Certification Completed: Not Required

CY131 Family Registration Completed: Not Required

Family Profile Completed (Synopsis): Not Required

Family Approval Document: Not Required

Assessment Completed: Yes

6 Month Review Completed: Not Required

Service Cannot Be Invoiced Until: 1/31/2022 9:30:43 AM

[Benchmark Details](#)

[Certification Details](#)

[Family Details](#)

[Family Synopsis](#)

[Family Approval Document](#)

[Assessment Details](#)

[Review Details](#)

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

SUPPORT GROUP
BENCHMARKS

SaveCancelRebuild

Post Permanency Support Group Benchmark

Benchmark Status: In Progress

Service

Service Type: Post Permanency Support GroupAssignment Date: 11/18/2021Referring Agency: [Redacted]

Child

SWAN ID: C-123456789DHS #: [Redacted]PAE #: [Redacted]
Last Name: RossFirst Name: MyronMiddle Name: [Redacted]Date of Birth: [Redacted]

Family

SWAN ID: F-123456789AUX ID #: [Redacted]
Partner 1: Last Name: WalkerFirst Name: AlanMiddle Name: DDate of Birth: [Redacted]
Partner 2: Last Name: BoltonFirst Name: CandaceMiddle Name: ADate of Birth: [Redacted]

Benchmark Completions

	Benchmark Template	Date Completed	Updated On
501	2012 Revised Authorization Protocol		11/18/2021
502	Assessment Form		11/18/2021
503	CAPAS		11/18/2021
504	Child Information Form for Child Care		11/18/2021
505	Child Safety Assessment Update		11/18/2021
506	Child Safety Assessment/Safety Plan		11/18/2021
507	FACTS IS		11/18/2021
508	Family Permission Form		11/18/2021
509	TS Risk Assessment		11/18/2021
510	Parent Questionnaire		11/18/2021

Benchmark Expenses

Expense Type	Amount	Completion Date	Updated On
Phone	10.00	5/1/2022	5/1/2022

Total Miles: 10Total Parking/Tolls: 0

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

SUPPORT GROUP BENCHMARKS

Primary Step	Secondary Step	Description	Practice Time (Hours/Minutes)	Travel Time (Hours/Minutes)	Completion Date	Commenter	Comments
1	1	Cost/Time Subtotals Cost - Include mileage, parking and/or toll expenses incurred in this step Time - Include time spent • Assigning referral • Reporting and collecting needed additional information on families • Meeting family members in person and/or via a meeting referral • Meeting referral or phone call • Affected workers related from (date)					
		Practice Time (Hours/Minutes) Travel Time (Hours/Minutes) Completion Date Commenter Comments					
		Practice Time (Hours/Minutes) Travel Time (Hours/Minutes) Completion Date Commenter Comments					
		Practice Time (Hours/Minutes) Travel Time (Hours/Minutes) Completion Date Commenter Comments					
		Practice Time (Hours/Minutes) Travel Time (Hours/Minutes) Completion Date Commenter Comments					
		Practice Time (Hours/Minutes) Travel Time (Hours/Minutes) Completion Date Commenter Comments					

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.

SUPPORT GROUP INVOICING

Type	Child Name	Family Name	SWAN ID	Service Type	Service Status	Assigned On	Due Date	Days To Complete	Completed On	County
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency Advocacy(Case Management)	Referred	12/28/2021	1/24/2022	8		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency Advocacy(Case Management)	Referred	12/28/2021	1/26/2022	38		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency Advocacy(Case Management)	Referred	12/28/2021	4/27/2022	68		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency Advocacy(Case Management)	Referred	12/28/2021	5/27/2022	98		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Respite	Referred	12/28/2021	1/27/2022	-22		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Respite	Referred	12/28/2021	1/24/2022	8		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Respite	Referred	12/28/2021	1/26/2022	38		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Respite	Referred	12/28/2021	4/27/2022	68		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Respite	Referred	12/28/2021	5/27/2022	98		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Respite	Referred	12/28/2021	6/24/2022	128		
Family	Patterson, Deanna	Saunders, Kendrick Ann and Melendez, Jeannette	F-291764	Post Permanency-Support Group	Referred	1/27/2022	7/24/2022	158		

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

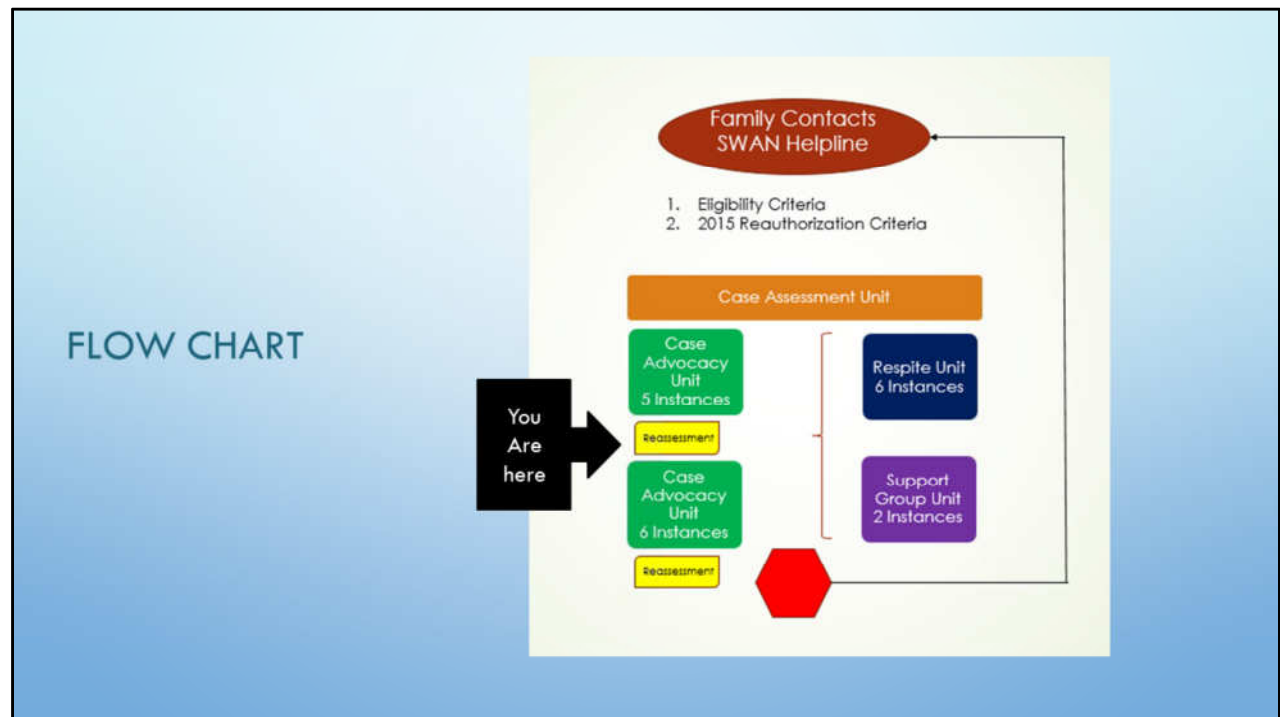
Every 3 months a new instance will open for invoicing.

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.

SUPPORT GROUP QUESTIONS





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.

REASSESSMENT DETAILS (6 MONTH REVIEW)

Service Search

NOTE: Only one required item is needed to perform a search.

☐ Child ☒ Family ☐ Include Overdue Services

Last Name * First Name SWAN ID * PAE # * Referral

Post Perm Serv Instance # Fund Source Fiscal Year Assignment Date

Service Type * ☐ Include Invalid Service Types

Service Status ☐ Select All Aff. Invoice # * ☐ Select All

Child Specific Recruitment - DHS	Invoiced	200207-46(1)
Family Profile - DHS	Paid	200208-46(1)
Family Profile Addendum - DHS	Pending Red	200209-46(1)
Post Permanency Advocacy/Assessment - DHS	Pending Yellow	200210-46(1)
Post Permanency Advocacy/Case Management - DHS	Pending-Awaiting Assignment	200211-46(1)
Post Permanency-Respite - DHS	Pending-Awaiting Units	200212-46(1)
Post Permanency-Support Group - DHS	Referred	200301-46(1)

Search Reset

To locate the details for the reassessment:

1. Use the *Service Search* screen.
2. Select a Service Type.
3. Select a Service Status.

REASSESSMENT DETAILS (6 MONTH REVIEW)

Page 1 of 7	Service Type	Family Name	Child Name	Referral #	Request #	Next Invoice #	Service Status	Status Date	Assignment Date	Instance
Require	Post-Permanency Advocacy/Case Management (\$300.00)	Abbott, Rolando and Moody, Matsoi	Seemey, Oscar	BH211029-237824			Referred	11/1/2021	11/1/2021	4
Require	Post-Permanency Advocacy/Case Management (\$300.00)	Abbott, Rolando and Moody, Matsoi	Seemey, Oscar	BH211029-237824			Referred	11/1/2021	11/1/2021	5
Review	Post-Permanency Advocacy/Case Management (\$300.00)	Abbott, Rolando and Moody, Matsoi	Seemey, Oscar	BH211029-237824			Referred	11/1/2021	11/1/2021	6
Require	Post-Permanency Advocacy/Case Management (\$300.00)	Anderson, Lorenzo Jr and Prince, Brandy James	Garcia, Emersilda	BH220104-240729			Referred	1/4/2022	1/4/2022	2

Service on Existing Request (Withdrawal, Void, or Invoice in Error):	No
Service Status = Referred:	Yes
Benchmarks Completed:	No
County Certification Completed:	Not Required
CY131 Family Registration Completed:	Not Required
Family Profile Completed (Synopsis):	Not Required
Family Approval Document:	Not Required
Assessment Completed:	Yes
6 Month Review Completed:	No
Service Cannot Be Invoiced Until:	3/31/2022

[Benchmark Details](#)
[Certification Details](#)
[Family Details](#)
[Family Synopsis](#)
[Family Approval Document](#)
[Assessment Details](#)
[Review Details](#)

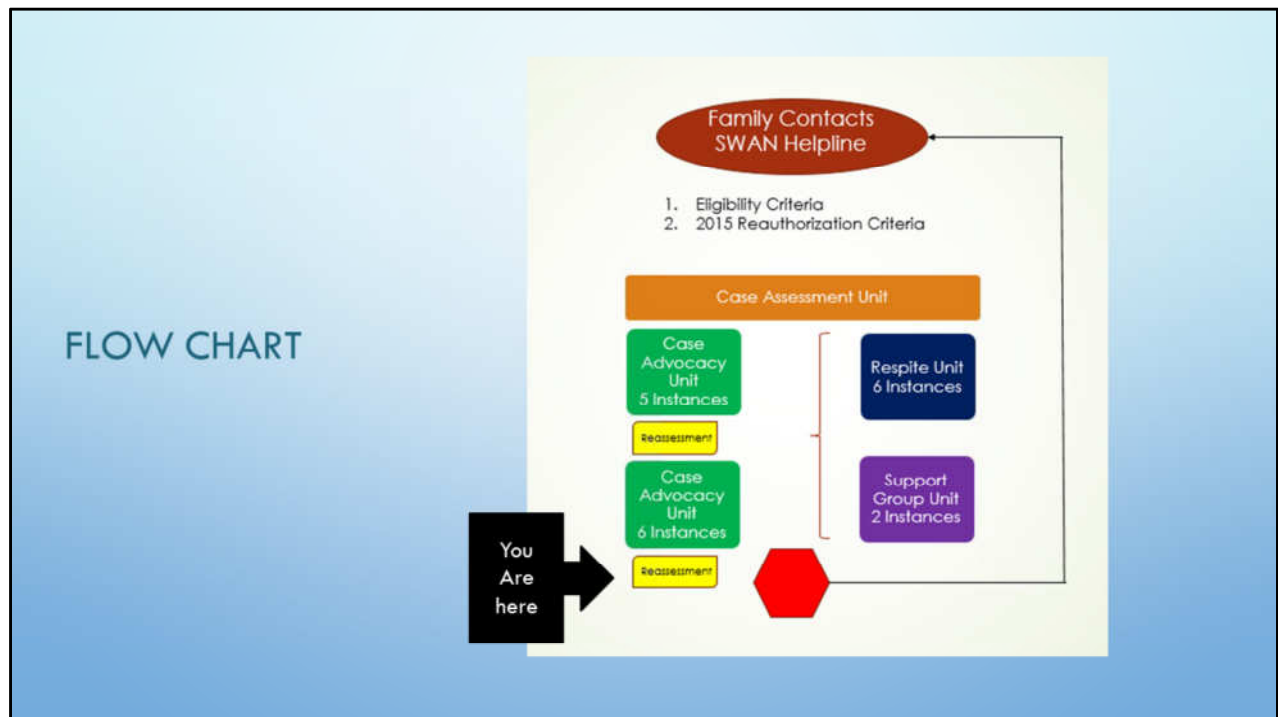
To continue with the reassessment process:

1. Select Require.
2. Select Review Details.

REASSESSMENT DETAILS (6 MONTH REVIEW)

[illegible]

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.

REASSESSMENT DETAILS (FINAL 6 MONTH REVIEW)

Service Search

Return to Previous

NOTE: Only one required item is needed to perform a search.

☐ Child ☒ Family ☐ Include Overdue Services

Last Name * First Name SWAN ID * PAE # * Referral

Post Perm Serv Instance # Fund Source Fiscal Year Assignment Date

Select... Select... Select... / / /

Service Type * ☐ Include Invalid Service Types

Service Status ☐ Select All

Aff. Invoice # * ☐ Select All

Child Specific Recruitment - DHS
Family Profile - DHS
Family Profile Addendum - DHS
Post Permanency Advocacy/Assessment - DHS
Post Permanency Advocacy/Case Management - DHS
Post Permanency-Respite - DHS
Post Permanency-Support Group - DHS

Invoiced
Paid
Pending Red
Pending Yellow
Pending-Awaiting Assignment
Pending-Awaiting Units
Referred

200207-46(1)
200208-46(1)
200209-46(1)
200210-46(1)
200211-46(1)
200212-46(1)
200301-46(1)

Search Reset

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.

REASSESSMENT DETAILS
(FINAL 6 MONTH REVIEW)

Page 1 of 7

Service Type	Family Name	Child Name	Referral #	Request #	Next Invoice #	Service Status	Status Date	Assignment Date	Instance
Post-Permanency Advocacy/Case Management (\$300.00)	Abbott, Rolando and Moody, Matias	Sevensen, Oscar	BH211029-237824			Referred	11/1/2021	11/1/2021	4
Post-Permanency Advocacy/Case Management (\$300.00)	Abbott, Rolando and Moody, Matias	Sevensen, Oscar	BH211029-237824			Referred	11/1/2021	11/1/2021	5
Post-Permanency Advocacy/Case Management (\$300.00)	Abbott, Rolando and Moody, Matias	Sevensen, Oscar	BH211029-237824			Referred	11/1/2021	11/1/2021	6
Post-Permanency Advocacy/Case Management (\$300.00)	Anderson, Lorenzo Jr and Prince, Brandy James	Garcia, Emersilda	BH220104-240729			Referred	1/4/2022	1/4/2022	2

Service on Existing Request (Withdrawal, Void, or Invoice in Error): No

Service Status = Referred: Yes

Benchmarks Completed: No

County Certification Completed: Not Required

CY131 Family Registration Completed: Not Required

Family Profile Completed (Synopsis): Not Required

Family Approval Document: Not Required

Assessment Completed: Yes

6 Month Review Completed: No

Service Cannot Be Invoiced Until: 3/31/2022

[Benchmark Details](#)

[Certification Details](#)

[Family Details](#)

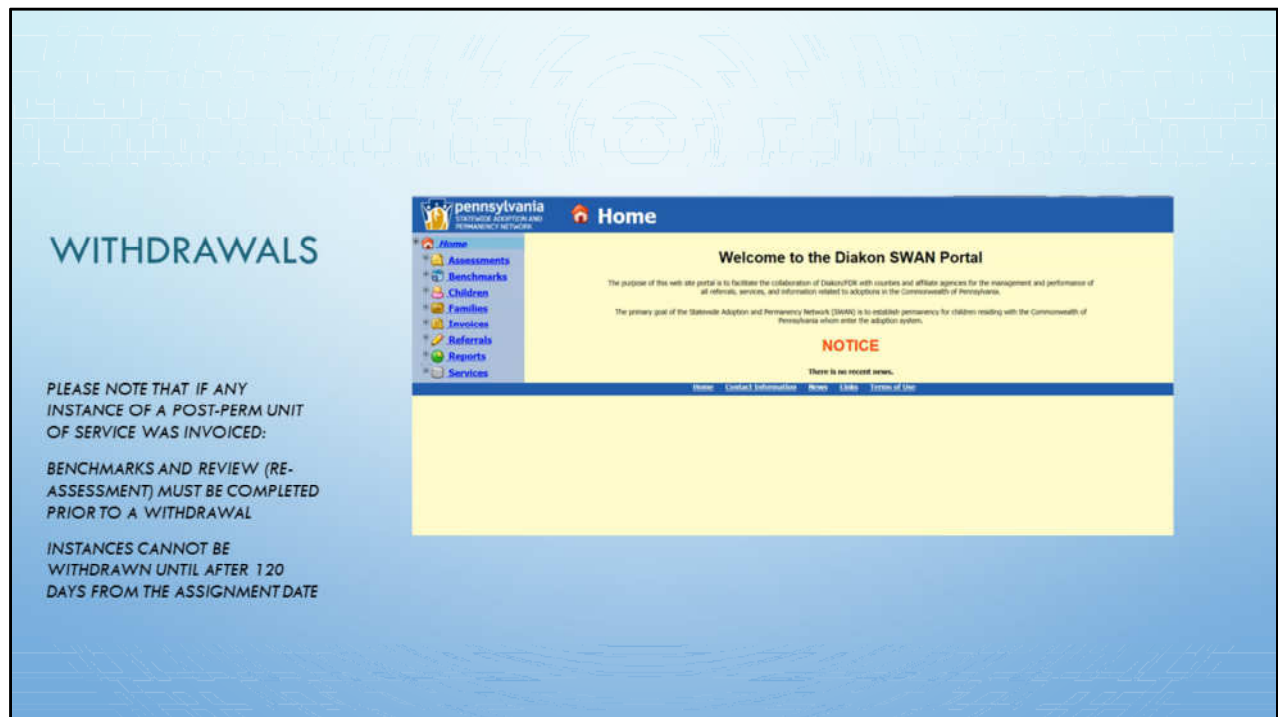
[Family Synopsis](#)

[Family Approval Document](#)

[Assessment Details](#)

[Review Details](#)

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



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.

HANDS ON QUESTIONS

