Permanency Plan Enhancement

Projected Date: April/May 2016

Objectives

- **More closely match TFACTS to the way Case Management staff work with their families**
- **Make entry of information more intuitive and easier for workers by consolidating information to a single screen for improved workflow and efficiency**
- **Integrate TFACTS functions so that information is entered once and then reused throughout the permanency planning process**

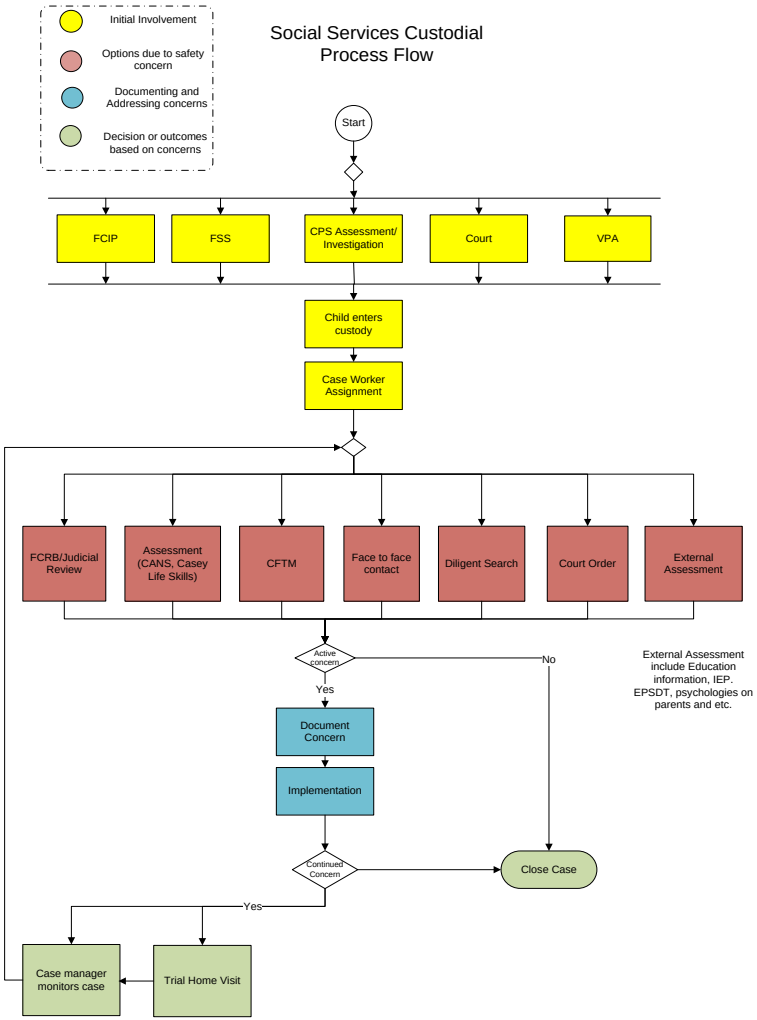
How Did We Get Here

- **Gathered input from front-line staff representing all program areas**
  - **Learn how the work is really done in the regions.**
  - **Learn what staff really need/want in a Permanency Plan.**
- **Documented workflow processes of major program areas**
  - **Social Services, On-going Non-Custody, CPS Non-Custody, Juvenile Justice, Extension of Foster Care, FCIP.**
  - **Used to understand the tasks, and relationships between tasks in and between workflows.**
  - **Reviewed and approved by program staff.**
- **Once all workflows were documented, commonalities were identified, and the focus of the new design started there.**

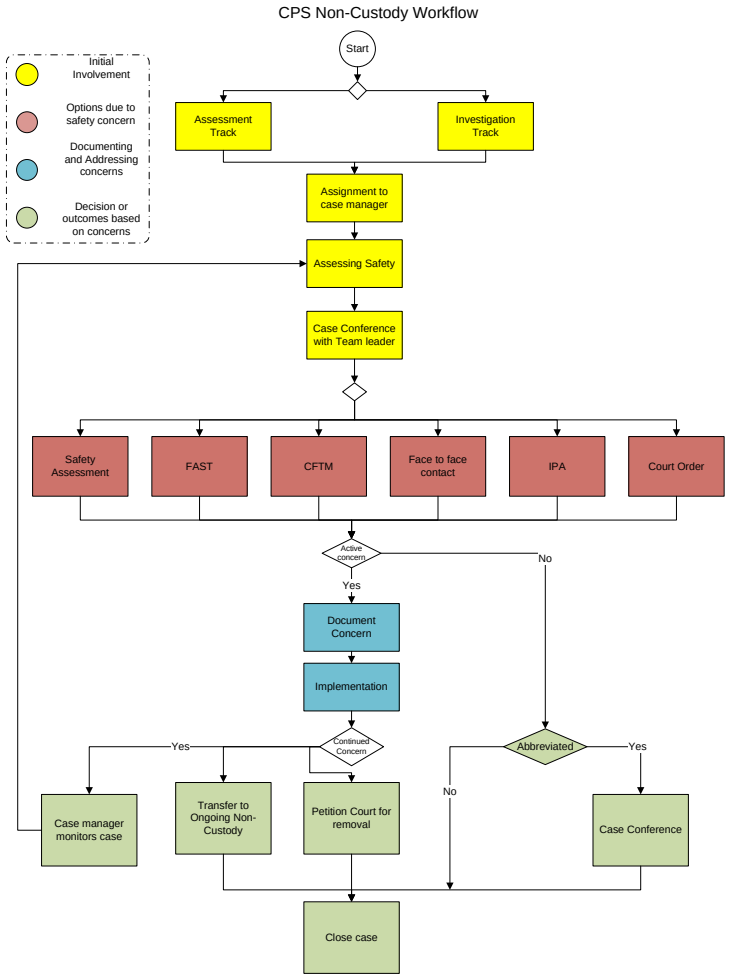
Commonalities between Workflows

- **Initial Involvement**
  - Identifies how a child/family becomes involved with DCS.
- **Options due to Needs**
  - Work that is done to identify/discuss the strengths and needs of a child/family.
  - Includes Assessments, CFTMs, court hearings, etc.
- **Documenting and addressing Needs**
  - Tasks and activities required to document needs and actions taken to address/resolve the needs.
- **Decisions or outcomes based on Needs**
  - After actions are taken to address/resolve the need, must determine whether to continue services or terminate services if the need no longer exists.

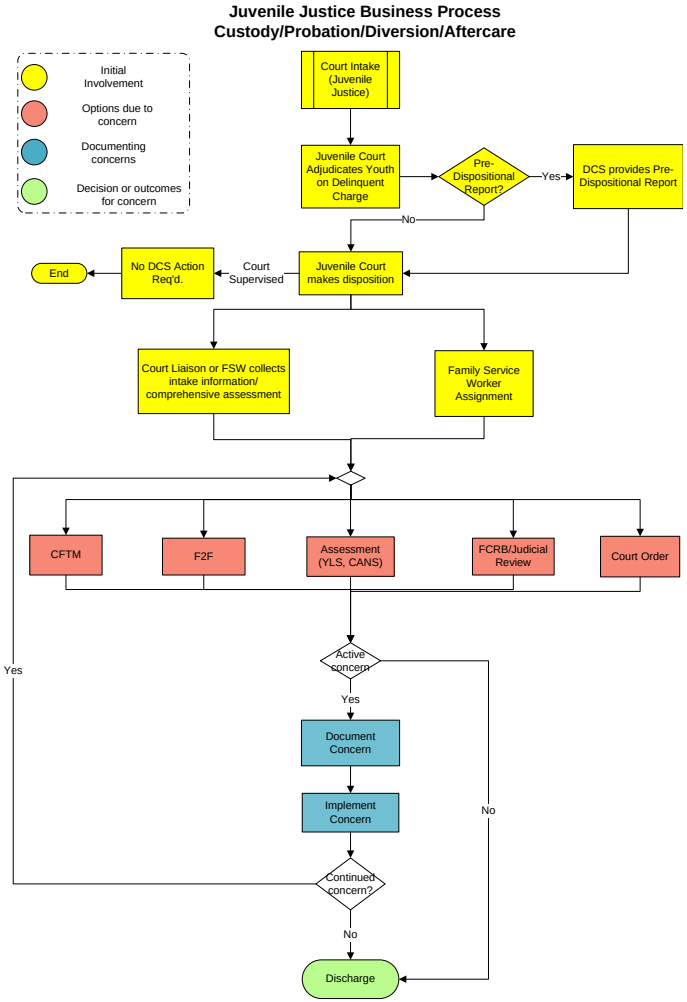
Social Services Workflow



CPS Non-Custodial Workflow



Juvenile Justice



Design/Development Approach

- **When TFACTS was implemented in 2010, it was largely a "Feature-Driven" system**
  - **Feature-driven development focuses more on features or functions themselves than the integration of features/functions into a business workflow.**

- **Starting with the Permanency Plan project, TFACTS design/development will be "Process-Driven"**
  - **Process-driven design/development focuses on the workflows –the way the work is actually done– and ensures the system compliments and supports the work instead of creating additional work.**

The Project Team and AGILE

- **Meet the Project Team**
  - **Julie Rotella – Product Owner - Executive Director of Regional Support**
  - **Lisa Brookover – Co-Owner – Mid-Cumberland Regional Administrator**
  - **Program staff stakeholders**
    - **Child Safety** – Pierce Beckham, Karmen Davis, Marjahna Hart, Milicent Thomas, Courtney Cusick
    - **Juvenile Justice –** Michael Flanery, Jodie Dalton, Melanie Collins
    - **FCIP –** Beth Wagner
    - **SS Custody/Adoption –** Connie Murphy, Emily Maness, Kerelyn Davis, Lois Gregory, Jenise Robles, Karen Chamberlain, Suzanne Lowe, Misty Miller, Heather Poster
    - **Ongoing Non-Custody/FSS –** Anna Denino
    - **Independent Living –** Dave Aguzzi
    - **Legal –** Christine Carlton, Linda Nieles
  - **OIT Development/BA/QA staff**

The Project Team and AGILE

- **Permanency Plan project is using the AGILE methodology**
  - **Customer satisfaction by early and continuous delivery of valuable software.**
  - **Quickly adapt to changing requirements, even in late development.**
  - **Working software is delivered frequently (weeks rather than months).**
  - **Close, daily cooperation between business people and developers.**

- **The Project Team conducts a brief daily meeting to communicate:**
  - **What they accomplished since yesterday.**
  - **What they plan to accomplish today.**
  - **Any barriers that prevents completion of tasks.**

The Project Team and AGILE

- **Design work is completed in two-week sprints**
  - **Demonstrations at the end of each sprint allow product owners and stakeholders a chance to accept or change the design.**
  - **Eliminates the risk of waiting until the project is complete only to find that it does not meet business needs/expectations.**

- **Development work is completed in four-month phases**
  - **At the end of each four month period, usable functions will be released to the production TFACTS environment.**
  - **Phase 1 of the Permanency Plan project is targeted for a late-April/early-May 2016 delivery date.**

Overview of Phase 1

Phase 1 of the Permanency Plan Enhancement includes changes or new functionality to the following areas:

- **Child and Family Team Meetings (CFTM)**
- **Strengths and Needs**
- **Action Steps**
- **External Assessments**
- **Immediate Protection Agreements**
- **Collateral Contacts**
- **Consultations**

Person Overview (Home) Screen

- **Changes will be made to the Person Overview Page so that it will start to function more like a "Home" page for a person.**
- **Allow quick/easy access to areas of TFACTS to review or record information involving a person**
- **After Phase 1 implementation, you will be able to document the following from the Person (Home) Overview page:**
  - **CFTMS**
  - **Collateral Contact**
  - **Consultation**
  - **External Assessment**
  - **IPAs**

Phase 1 Changes to Person Overview (Home)

TN Department of Children's Services | TFACTS

SIT

home | search | incident reporting | help & training | customer care | log off

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Home | Intake | Case | Resource | Financial | Administration

Workload | Desktop | Calendar | Approvals

| help |

Mitc

Viewing for [redacted]

[redacted] Work (35) | 0 | Reassign | End

Supervises

Type	ID	Name	Assignment Role
Ongoing Case	938[redacted]	[redacted]	SS Custody Worker
Ongoing Case	626[redacted]	[redacted]	SS Custody Worker
Select Recordings	Case Status: Open Case Status Date: 08/13/2015	Organization: East Tennessee Region	
Person Overview			
Ongoing Case	2917[redacted]	[redacted]	SS Custody Worker
Ongoing Case	297[redacted]	[redacted]	SS Custody Worker
Ongoing Case	292[redacted]	[redacted]	SS Custody Worker
Ongoing Case	626[redacted]	[redacted]	SS Custody Worker
Ongoing Case	938[redacted]	[redacted]	SS Custody Worker
Ongoing Case	283[redacted]	[redacted]	SS Custody Worker
Ongoing Case	292[redacted]	[redacted]	SS Custody Worker
Ongoing Case	256[redacted]	[redacted]	SS Custody Worker

1 2 | 10 items per page | 1 - 10 of 17 items

HOME | HELP & TRAINING | PRIVACY & SECURITY | /administration/workload.jsp cm60_s01_workload_screen SIT31 version 03-10-2016 02:00 PM

javascript: submitFormFromHyperlink('/WorkloadModify.do?command.do(personOverviewLinkView)=1&personId=32625909')

TN Department of Children's Services

Phase 1 Changes to Person Overview (Home)

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SIT

home | search | incident reporting | help & training | customer care | log off

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| help |

Person Overview

Person ID:	326	Gender:	Male
Name:	Bair	DOB:	08
Address:		Age:	6 M
Phone/Contact:		Employee:	No

Person Details

Person Profile	Person Characteristics	Scan Documents
Education	Legal History	Monthly Summary
Health	TFACTS History	Military History
Financial	Relationship History	Merge History
Assessment History	AFCARS Summary	

CFTM | Collateral Contact | Consultation | External Assessment | IPA

Close

/intake/intake_person_basic.jsp pm01i_view_person_overview SIT31 version 03-10-2016 02:00 PM

Child and Family Team Meetings (CFTMs)

- **The CFTM module of TFACTS will be completely re-designed during Phase 1 of the Perm Plan project.**
  - **You will still be able to schedule a CFTM in TFACTS, but it will not be required in order to document the actual meeting.**
  - **Other options will be Reschedule, Cancel, or Hold a CFTM.**
  - **CFTM Details will now be all on one screen!**
- **Strengths and Needs (formerly Concerns) already recorded in TFACTS will pre-populate the CFTM**
  - **Staff won't have to re-enter.**
  - **Easy access to the information without having to click to a different module.**
  - **Will be able to update, or create new, Strengths and Needs directly from the CFTM**

Phase 1 additions to Person Overview (Home) cont.

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SIT

home | search | incident reporting | help & training | customer care | log off

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| help |

Person Overview

Person ID:	326	Gender:	Male
Name:	Bai	DOB:	0
Address:		Age:	6
Phone/Contact:		Employee:	No

Person Details

Person Profile	Person Characteristics	Scan Documents
Education	Legal History	onthly Summary
Health	TFACTS History	litary History
Financial	Relationship History	erge History
Assessment History	AFCARS Summary	

Actions:

- Schedule a CFTM
- Reschedule a CFTM
- Hold a CFTM
- Cancel a Scheduled CFTM
- Delete a CFTM

CFTM | Collateral Contact | Consultation | A | A

Close

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CFTM – Scheduling Meeting

| help |

Person Overview

CFTM Schedule

Scheduled Meeting Date: 03/11/2016

Scheduled Meeting Time: 02:00 PM CT

CFTM Type(s): CPS - Initial Non-Custody ×
CPS - Transition Non-Custody ×

Location Type:

Location:

- CPS - Initial Non-Custody
- CPS - Precustodial CFTM
- CPS - Progress Review of Non-Custody
- CPS - Transition Non-Custody
- Discharge/Exit Custody
- FSW - Initial Non-Custody
- FSW - Precustodial CFTM
- FSW - Progress Review of Non-Custody

Phone Conf. Number:

Phone Conf. Code:

Video Conf. Number:

Video Conf. Code:

Participants

Person ID	Name	Role
		No items to display

0 10 items per page

CFTM – Scheduling Meeting (Continued)

CFTM Type(s): CPS - Initial Non-Custody ×
CPS - Transition Non-Custody ×

Video Conf. Number:

Video Conf. Code:

Location Type: DCS Office

Location:

- Court
- DCS Group Home
- DCS Office
- DCS Youth Development Center
- Detention/Jail
- Family Home
- Hospital

Participants

Person ID	Nam	Role
		No items to display

0 10 items per page

Add Delete

Status: Draft

Apply Save Cancel

CFTM – Scheduling Meeting (Continued)

CFTM Type(s): CPS - Initial Non-Custody ×
CPS - Transition Non-Custody ×

Video Conf. Number:

Video Conf. Code:

Location Type: DCS Office

Location:

Participants

Person ID	Name	Role
		No items to display

0 10 items per page

Add Delete

Status: Draft
Draft
Scheduled

Apply Sa

CFTM Meeting Details

| help |

Person Homepage

CFTM

CFTM Schedule

Actual Meeting Date:

Actual Meeting Time: CT

CFTM Type(s):

Location Type:

Location:

Was a Notice of Action (NOA) given to Team Members?

TennCare Appeal Rights Explained?

Did most members agree with the team's decision(s)?

Phone Conf. Number: Code:

Video Conf. Number: Code:

Participants

Person ID	Name	Role	Participation Method	Invited
280	Ben			

1 10 items per page 1 - 1 of 1 items

Add

CFTM Meeting Details (Continued)

Little, Tom STRENGTH
Description goes here...

Progress Status:
Review End Date:
Review Status: Draft
Review End Reason:
What Has Changed: Description goes here...

Little, Tonya STRENGTH
Description goes here...

Little, Timmy NEED
Description goes here...

Little, Tanner NEED
Description goes here...

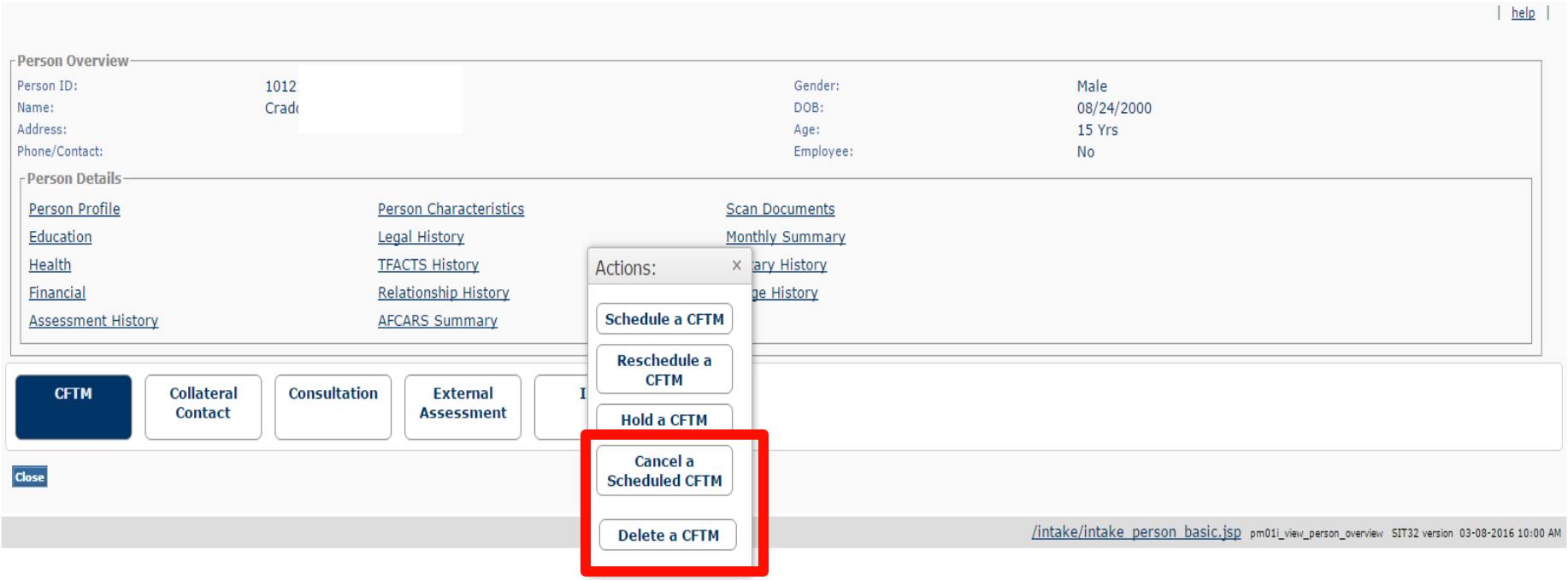
Meeting Summary:
Describe why this meeting was convened and the family's understanding of the situation. Include suggestions made for prevention, placement options, and family resources.

Next Meeting Date:
Next Meeting Time: CT

Status: In Progress

Print Approval
Apply Save Cancel

CFTM Cancel, Delete & Mark in Error



Example: Cancel CFTM

TFACTS - Person - Pr

https://team2-sit.dcs.tn.gov/CftmScheduleModify.do

Apps | Edison | Remedy 8 | Adobe Connect... | OBIEE | Survey Monkey ... | Staging | IT Academy | TFS | CLS | SP Cloud | Cigna-ParTNers... | SIT | TFACTS Applica... | Other bookmarks

TN Department of Children's Services | TFACTS

SIT

home | search | incident reporting | help & training | customer care | log of

Logged In: Bryson, Carol [DCS Central Office]

| help |

Your data has been saved. close confirmation

Person Overview

Person ID:
Name: in
Address:
Phone/Contact:

Gender: Male
DOB: 08/24/2000
Age: 15 Yrs
Employee: No

Person Details

Person Profile
Education
Health
Financial
Assessment History

Person Characteristics
Legal History
TFACTS History
Relationship History
AFCARS Summary

CFTM | Collateral Contact | Consultation | External Assessment

Close

Records:

Choose a CFTM to cancel:

Person ID	Full Name	CFTM Date/Time
1012	Cra	04/01/2016 12:30 AM

1 | 10 items per page

1 - 1 of 1 items

Select

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Example: Delete CFTM

TFACTS - Person - Pr

https://team2-sit.dcs.tn.gov/CftmScheduleModify.do

Apps | Edison | Remedy 8 | Adobe Connect... | OBIEE | Survey Monkey ... | Staging | IT Academy | TFS | CLS | SP Cloud | Cigna-ParTNers... | SIT | TFACTS Applica... | Other bookmarks

TN Department of Children's Services | TFACTS

SIT

home | search | incident reporting | help & training | customer care | log of

Logged In: Bryson, Carol [DCS Central Office]

help

Your data has been saved. close confirmation

Person Overview

Person ID:	10	Gender:	Male
Name:	Cra	DOB:	08/24/2000
Address:		Age:	15 Yrs
Phone/Contact:		Employee:	No

Person Details

Person Profile	Person Characteristics
Education	Legal History
Health	TFACTS History
Financial	Relationship History
Assessment History	AFCARS Summary

CFTM | Collateral Contact | Consultation | External Assessment | I

Close

Records:

Choose a CFTM to delete:

CFTM Date	CFTM Time	Status
02/01/2016	12:00 CT	In Progress
04/01/2016	12:30 CT	Draft

1 | 10 items per page

1 - 2 of 2 items

Delete

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External Assessments

An Assessment that is completed by a non-DCS professional (e.g. Vocational Assessment, Psychological Assessment, etc.).

- **Designed to allow staff to track information for Assessments performed by sources outside DCS.**
- **Any Strengths and Needs previously recorded for the Concerned Person will display on the External Assessment screen.**
  - **Can add new or update existing Strengths and Needs from this screen.**
- **Narrative regarding the External Assessment may be typed into the Assessment Summary Narrative Field.**
- **The <u>Document</u> button allows the External Assessment document to be uploaded to that External Assessment Record.**
- **Options for External Assessment are: Add, Delete, Update, Upload, and View.**

External Assessments

External Assessment

Concerned Person: Cra

PersonId: 101

Assessment Date:* 03/01/2016

Assessment Received Date:* 03/01/2016

Assessment Type:* Other Specialized Assess...

Other Type Text:* Document name

Conducted By: Brenda Goff

Assessment Summary:

text text

Status: Completed

Document

Apply | Save | Cancel

HOME | HELP & TRAINING | PRIVACY & SECURITY |

/planning/external_assessment.jsp cm00_external_assessment SIT31 version 03-08-2016 06:00 PM

External Assessments

| help |

Person Overview

Person ID:	9356188	Gender:	Male
Name:	Mouse, Mickey	DOB:	01/01/2000
Address:		Age:	16 Yrs
Phone/Contact:		Employee:	No

Person Details

Person Profile
Education
Health
Financial
Assessment History
Person Characterist
Legal History
TFACTS History
Relationship Histor
AFCARS Summary

Actions: X

Create an External Assessment

Delete External Assessment

I would like to: X

Create a New External Assessment

Update Existing External Assessment(s)

CFTM | Collateral Contact | Consultation | Assessment | A

Close

/intake/intake_person_basic.jsp pm01i_view_person_overview SIT31 version 03-10-2016 02:00 PM

Collateral Contacts

- **Collateral contacts are conversations, by telephone, in-person, or in writing that the worker has with persons on behalf of the client.**

- **This includes any professional providing formal services (e.g., therapists, teachers) and others important to the client (e.g., neighbors, ministers).**

Collateral Contacts

| help |

Person Homepage

Collateral Contact

Contact Date: 03/01/2016

Contact Time: 01:00 PM CT

Contact Method:

- Attempted Call
- Attempted Face To Face
- Correspondence
- DCS Not Present
- E-mail
- Face To Face
- Mail

Participants

Person ID	Name
1012	Crad

0 10 items per page

No items to display

Add

Narrative:

Status: In Progress

Apply Save Cancel

HOME | HELP & TRAINING | PRIVACY & SECURITY | /planning/collateral_contact.jsp xx99_x01_planning_collateral_contact SIT31 version 03-08-2016 06:00 PM

Immediate Protection Agreements

An agreement between Parent/Caretakers and DCS created when a parent/caretaker's access to the child needs to be limited due to concerns for the safety of the child.

- **TFACTS will display any active Strengths and/or Needs for persons added to the IPA**
  - **Can add new or update existing Strengths and Needs from this screen**
- **Options for IPA's include: Add, Delete, Update, and View**

Immediate Protection Agreement

| help |

Person Homepage

IPA

IPA Date:

Date Legal Counsel Notified:

IPA Category:

- In-Home Restrictions/Modifications
- Interruption/Modification of Visitation
- Non-Custodial Placement of Child(ren)
- Parent/Caretaker and Child(ren) leave current residence
- Restraining Order: Non-Parent/Caretaker
- Restraining Order: Parent/Caretaker

Participants

Person ID	Name		Role
101	Cradd		

0

No items to display

Add

Strengths & Needs

Choose an action...

Status: In Progress

Apply | Save | Cancel

HOME | HELP & TRAINING | PRIVACY & SECURITY | /planning/ipa.jsp cm00_ipa SIT31 version 03-08-2016 06:00 PM

Consultations

- **Consultations are conversations that take place between parties internal to DCS.**
  - **For example, a case manager may discuss specifics related to the progress of a concern with legal and from that conversation, new action steps and/or concerns may arise.**

- **Case Consultations may result in updating actionable items, such as Strengths, Needs and Action Steps associated with Needs.**

Consultations

| help |

Person Homepage

Consultation

Consultation Date:

Consultation Time: CT

Consultation Type:

- 6 Month Review
- 60 Day Review
- 9 Month Review
- 90 Day Review
- ASFA Review
- Backlog Review
- Case Closing Conference

Participants

Person ID	Name		Role
1012	Crad		

0 10 items per page No items to display

Add

Narrative:

Status: In Progress

Apply Save Cancel

HOME | HELP & TRAINING | PRIVACY & SECURITY | /planning/consultation.jsp cm00_consultation SIT31 version 03-08-2016 06:00 PM

Consultations

| help |

Person Overview

Person ID:	10121110	Gender:	Male
Name:	Craddock, Ryan Austin	DOB:	08/24/2000
Address:		Age:	15 Yrs
Phone/Contact:		Employee:	No

Person Details

Person Profile	Person Characterist	
Education	Legal History	
Health	TFACTS History	
Financial	Relationship History	
Assessment History	AFCARS Summary	

Actions: X

Create a Consultation

Delete a Consultation

I would like to: X

Create a new Consultation

Continue with an existing Consultation

CFTM | Collateral Contact | Consultation | External Assessment | IPA

Close

Coming in Phase 2

- **Face to Face Contacts**
  - **Will be integrated into a separate object in TFACTS and will no longer be part of the Case Recording module.**
- **TCM (Targeted Case Management)**
  - **Derive the TCM elements based on the categorization of the needs and services.**
  - **when those needs/services are reviewed (via CFTM or some other means) the system will know that the activity was TCM-related.**

Questions?