Chapter 8

HEP

Health and **E**ducation **P**assport

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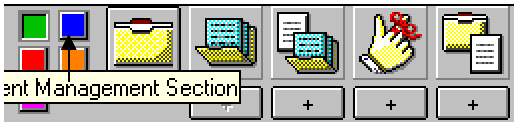
Introduction

The Health and Education Passport (HEP) must be provided to the substitute care provider (SCP) within 28 days of the initial placement and within 48 hours of any following placement. Entering the data that is displayed in the HEP requires the use of a number of notebooks, most notably, the Education and Health notebooks. County practices vary regarding the specific entry person for this information, particularly in the Health notebook. Some counties have specific staff, Public Health Nurses that enter all health information; the social worker does not enter health data. Some counties use Public Health Nurses to enter CHDP and Well Child exams, but workers enter the balance of the health information, and some counties, the worker enters all health information. The same variations occur to a lesser degree among counties regarding the Education notebook. Be sure to know what the specific county practice is in the individual employing county.

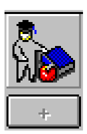
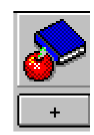
Education Provider Notebook

First, open the case or referral and enter the data for the child in question. With the appropriate case or referral open, click on the “Client Management Section.”



When the “Client Management Section” is in focus, there will be a large number of notebooks from which to choose.

Observe that even though there are a number of notebooks, it is not possible to create a “New” Health or Family Information notebook. That is because the “Health”  notebook and the “Family Information”  notebook are created for the client at the same time the client is created.

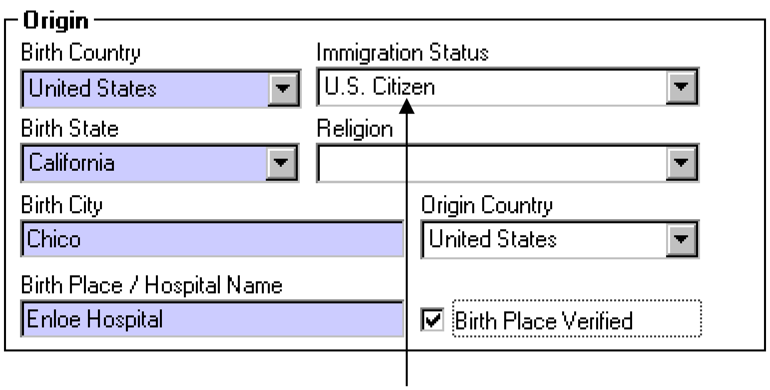
The “Education Provider”  notebook is created as the client’s “Existing Education”  notebook is completed. It provides identifying information about the schools the child is, or has, attended.

First, open the specific client that the HEP is being created for. Next, open the client ID and demographics pages to ensure that the pages are as complete as possible. On the ID page, complete the client's Social Security Number 

and the client's Date of Birth 

fields if the information is available. On the Demographics page, be sure the fields in the "Origins" information box are as complete as possible.

Below is a sample of a completed "Origins" information box.



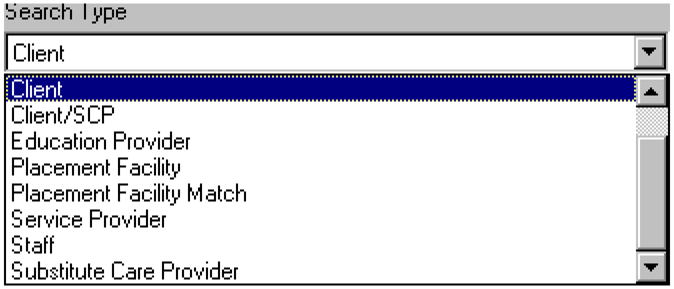
It is essential to complete the "Immigration Status" field to determine eligibility for foster care though the "Immigration Status" is being shown in relationship to the HEP. If this field is left blank, the child is not documented as a U.S. Citizen on the "FC2" form. With the exception of "Religion," all other fields may be completed from the client's birth certificate.

The "Service Providers" page is the next page for review. It is important to record the child client's service providers, both current and past providers. To record a client's service provider, first search for the service provider.

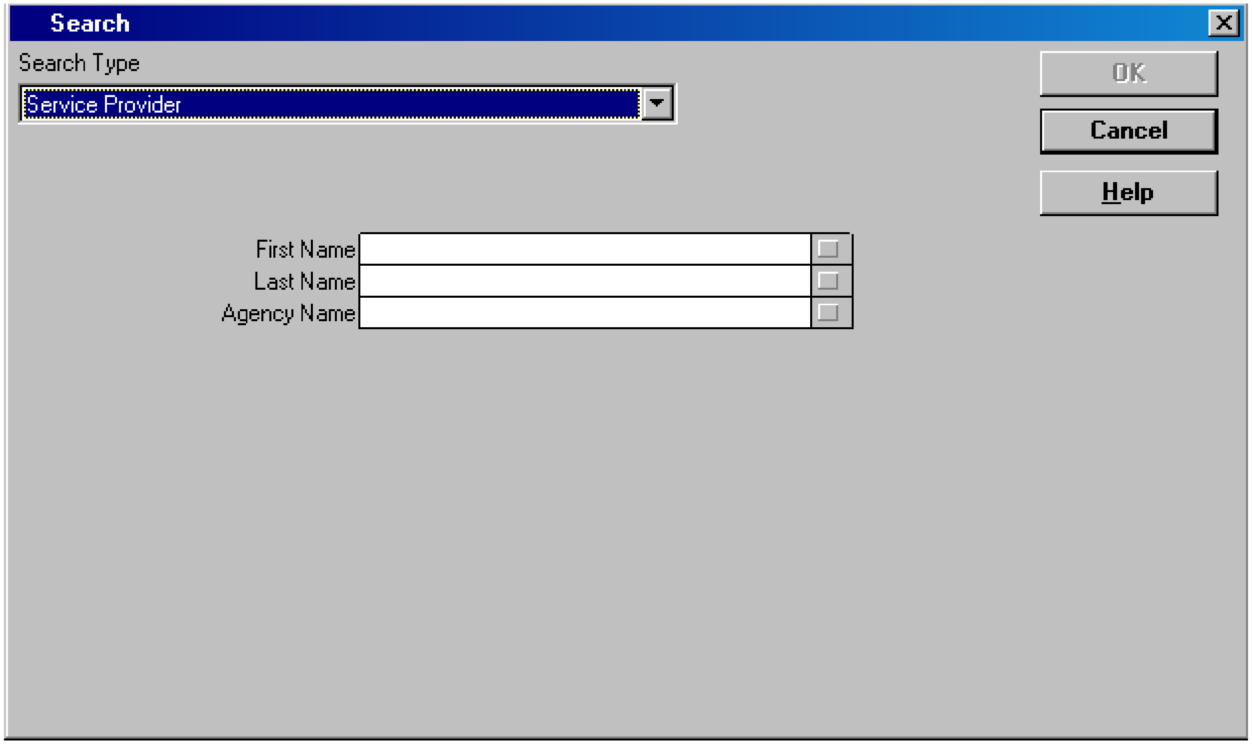
Service Provider Search

To search for a service provider, click on "Search" in the drop down menu.

Select "Start Search." Select "Service Provider" for the "Search Type."

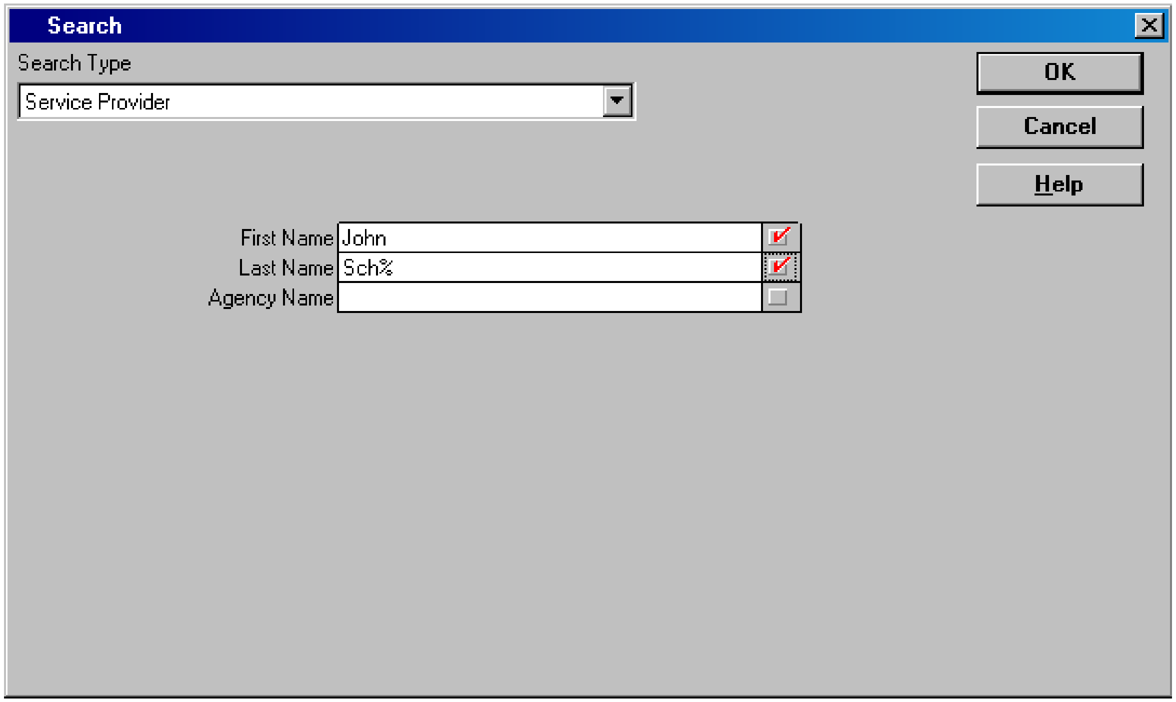


That will result in the following dialogue box.



Type in the service provider's name or the name of the agency that the service provicer works for. Do not complete both. If unsure of the spelling of the service provider's name, use a "wildcard." The wildcard in the symbol "%." The percent mark may be used at the end of a string of characters, at the beginning, or in the middle. If not sure of a full name but know part of it, the wild card could be used as follows: Anders%n. The system will look for all services whose name begins with Anders and ends in n. It will find all entries that meet that condition regardless of how many characters are between the s and the n. It could also be used for hyphenated names, for example, Mary Smith-Allen. If not sure how Mary recorded her name or how it was entered, the last entry could be %Allen. That would find every service provider in the state whose last name ended in allen.

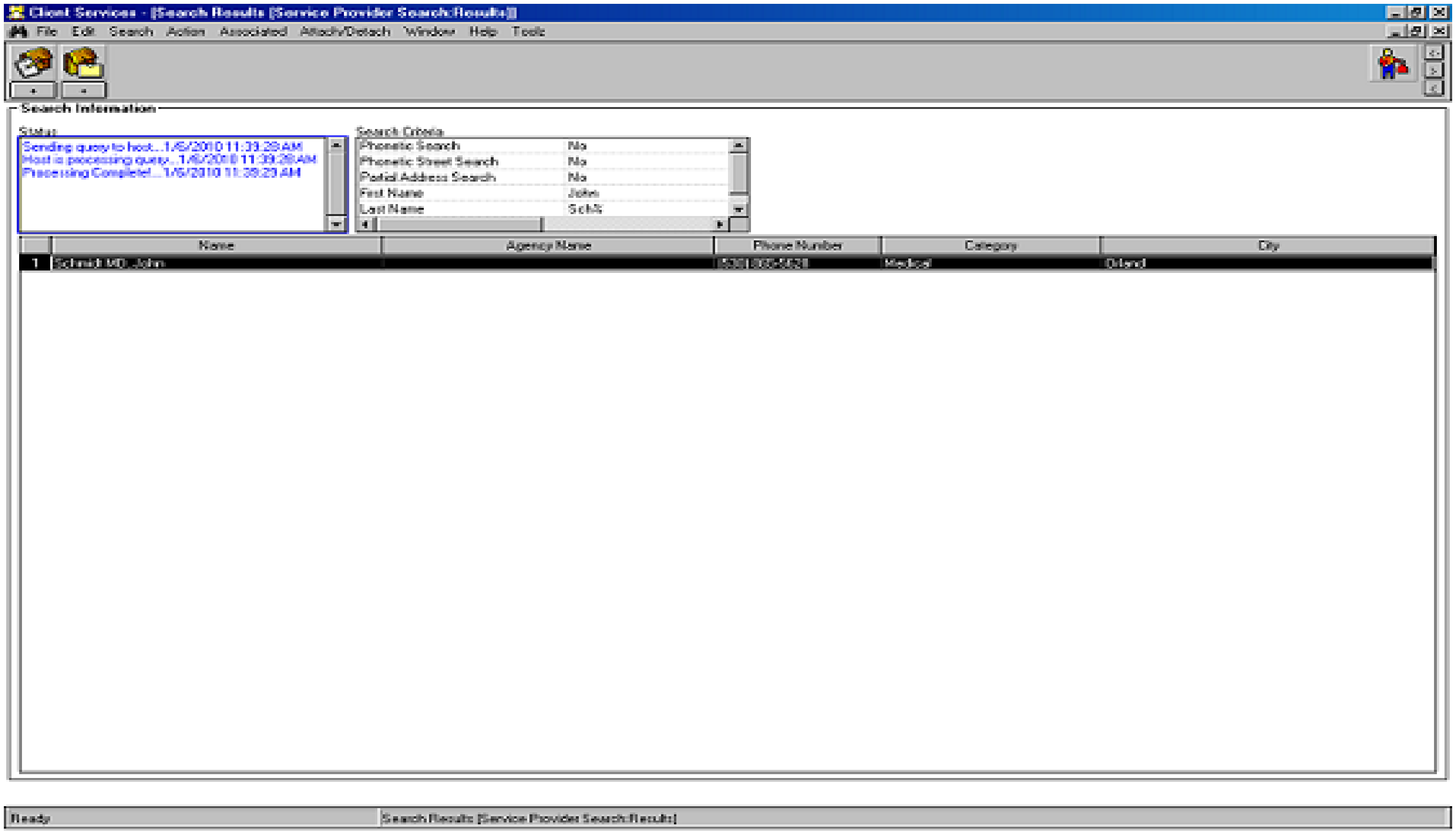
Shown on the next page is a search for an imaginary service provider named John Schmidt. The spelling of the last name is not known.



After completing the page above, click “OK.”

Hint: The okay button will not be enabled until the application knows the entry in the last name field is completed. An easy way to make the application know the entry is complete is to hit the tab button.

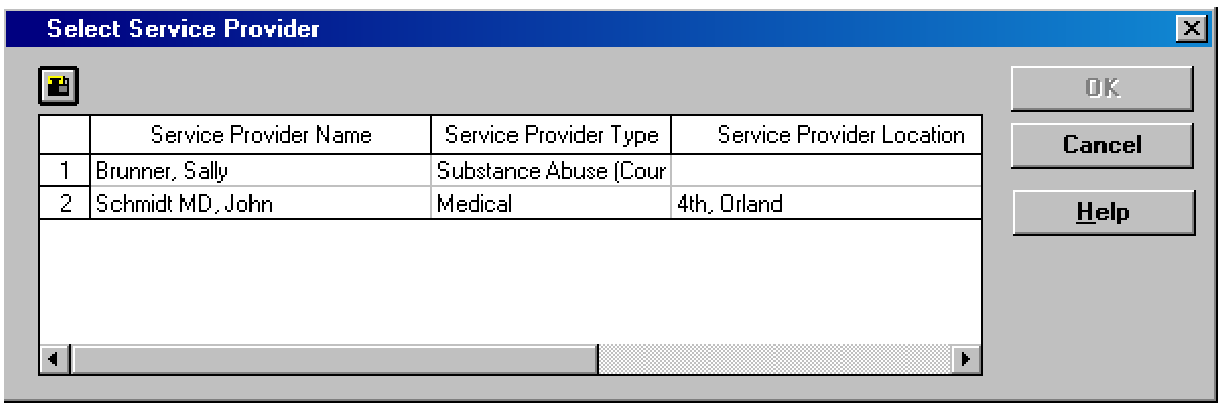
Below is a sample "search results" page for the demonstrated search. In the example, only one result was obtained. There will probably be more than one, so be sure which service provider is the desired one.



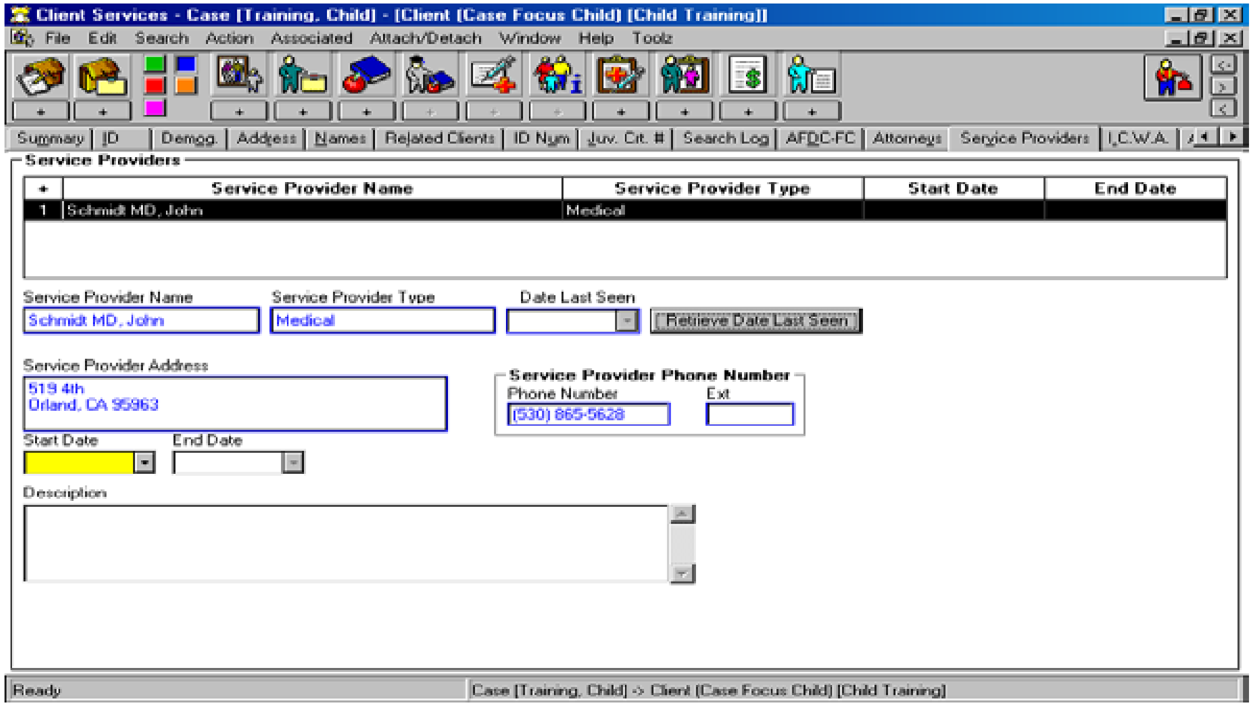
To open an abstract of the service provider, double click on the service provider. The new screen will provide more detail regarding that service provider in order to confirm the correct one.

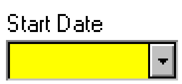
After searching for and finding the client's service provider, close the search results page by clicking on the bottom of the two "X"s in the top right corner of the page.  This action returns the application to the page where the search began. In this example, that would the "Service Provider" page of the client notebook. From this point, click on the "+" in the top left corner of the grid to add a service provider.

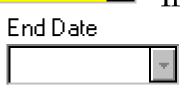
That will result in the dialogue box shown below.



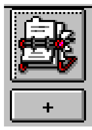
The service provider to enter for this client is Dr. Schmidt. He is number two in the list. The service provider "Brunner, Sally" is being pulled from a different "Service Provider notebook" in the application that will be discussed later. Click on line two, which will enable the "OK" button. Next, click the "OK" button. Dr. Schmidt has now been entered as a service provider for the client "Child Training."



Enter the "Start Date." 

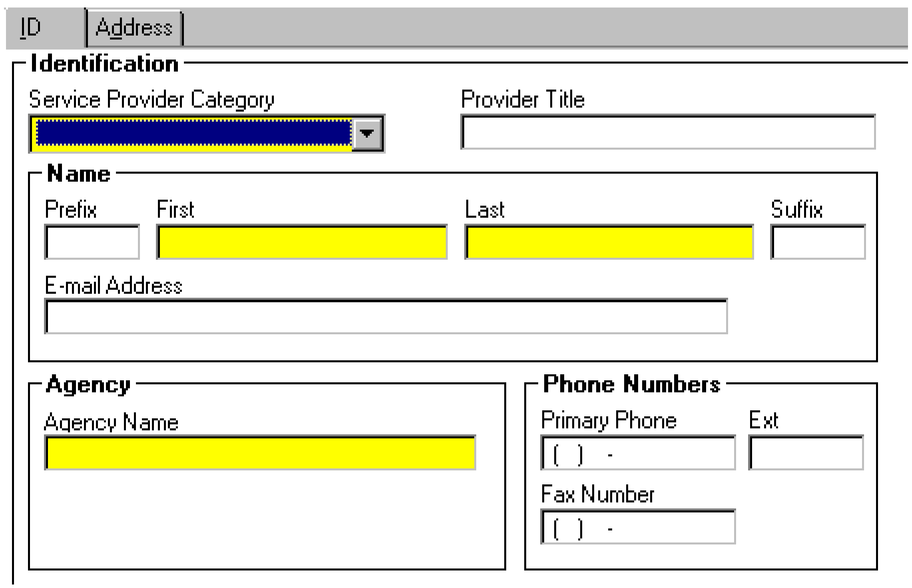
If this service provider should cease to provide services to this client, return to this page and enter the "End Date." 

What if the service provider is not found? It is best to search multiple times with different combinations. At first, new workers should also ask a more experienced person to search for the same service provider. While this is a time consuming practice, it should help reduce the number of duplicate service providers. When assured that the desired service provider does not exist in the statewide database, follow the next steps to create a "**NEW**" service provider. Remember, "new" means that it does not exist in the database.

Go to the "Service Management" section.  Clicking on the orange button will display a choice of two notebooks, the contact notebook,  and the "Service Provider" notebook. 

Creating a New Service Provider

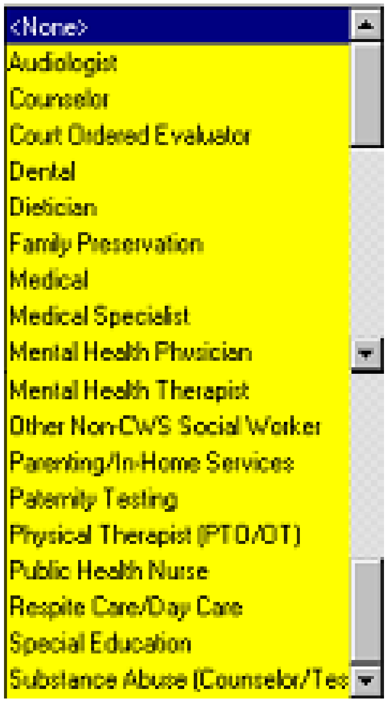
This is the second "Service Provider" notebook referred to earlier. The first notebook explained is specific to a client. This notebook is general to the entire case or referral. Either notebook will result in being able to see the service providers entered in them in the contact drop down menu. However, only the service providers entered in the Client Management Service Provider notebook is available in Case Plan and will populate to the HEP.



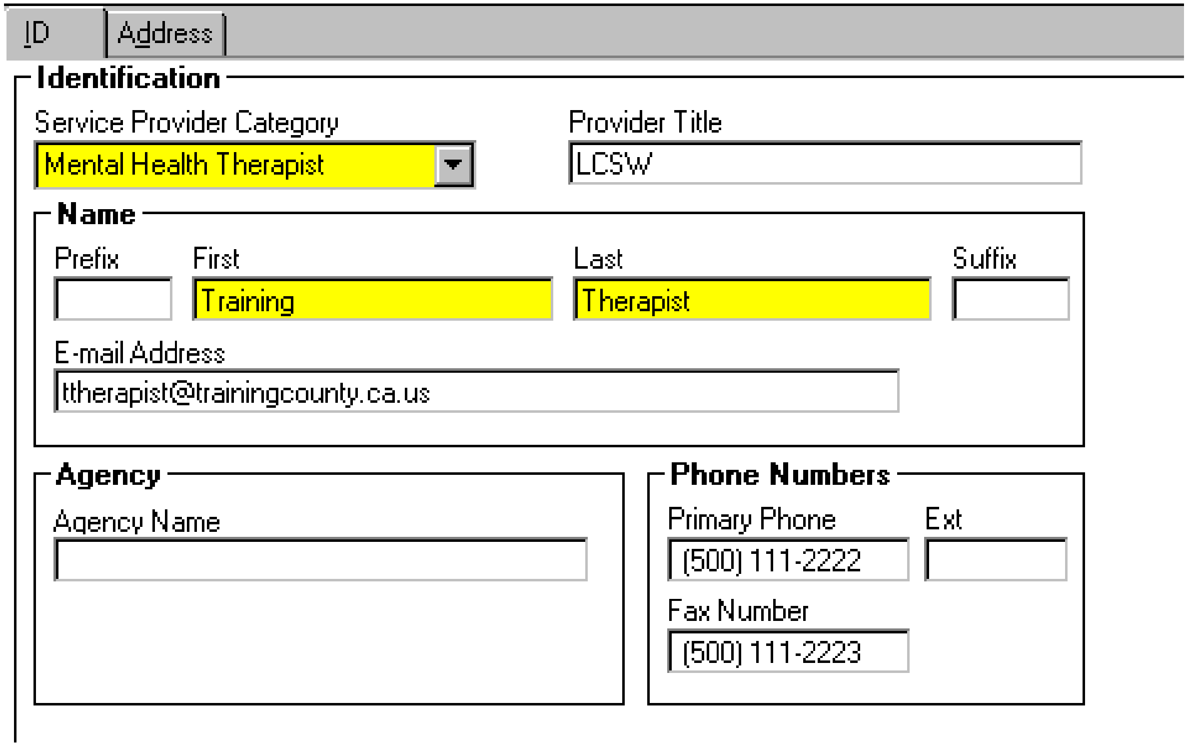
To create a "New" service provider, click on the "+" below the cornucopia with the person in front of it. That will result in the application page shown to the right.

Select a "Service Provider Category" from the drop down menu.

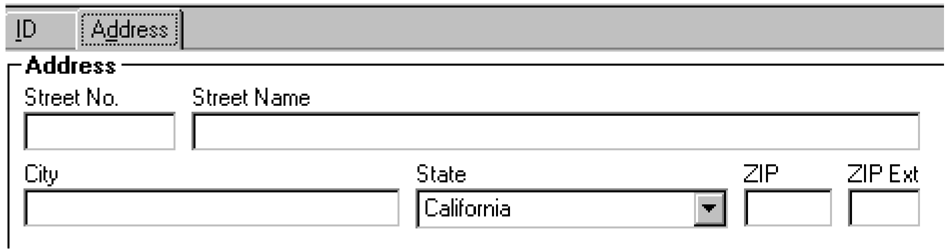
Next, the expanded list is shown. These are all the possible selections. Click on the selection that best describes this service provider.



Complete the data fields in the "Identification" information box, if known. If the service providers' name is not known, fill out the information in the "Agency" information box. Complete the phone number.



Next, go to the "Address" page, and complete the data fields there.



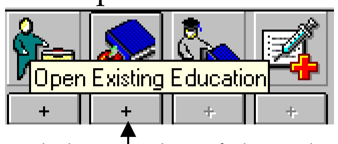
That completes creating a "New" service provider.

Hint: On the ID page, when the page is first opened, both the name and the agency are mandatory (yellow) fields. When either field is started, the other field is no longer mandatory.

Now go back and attach this service provider to a specific client, especially if this is a child client's service provider. The steps are the same as first demonstrated, except that no search is required. Go to the specific client, open the service provider page, and click on the "+" in the top left of the grid. Select the newly created service provider and enter the start date.

Hint: All service provider search results and create service providers since the last save to database will be in the list.

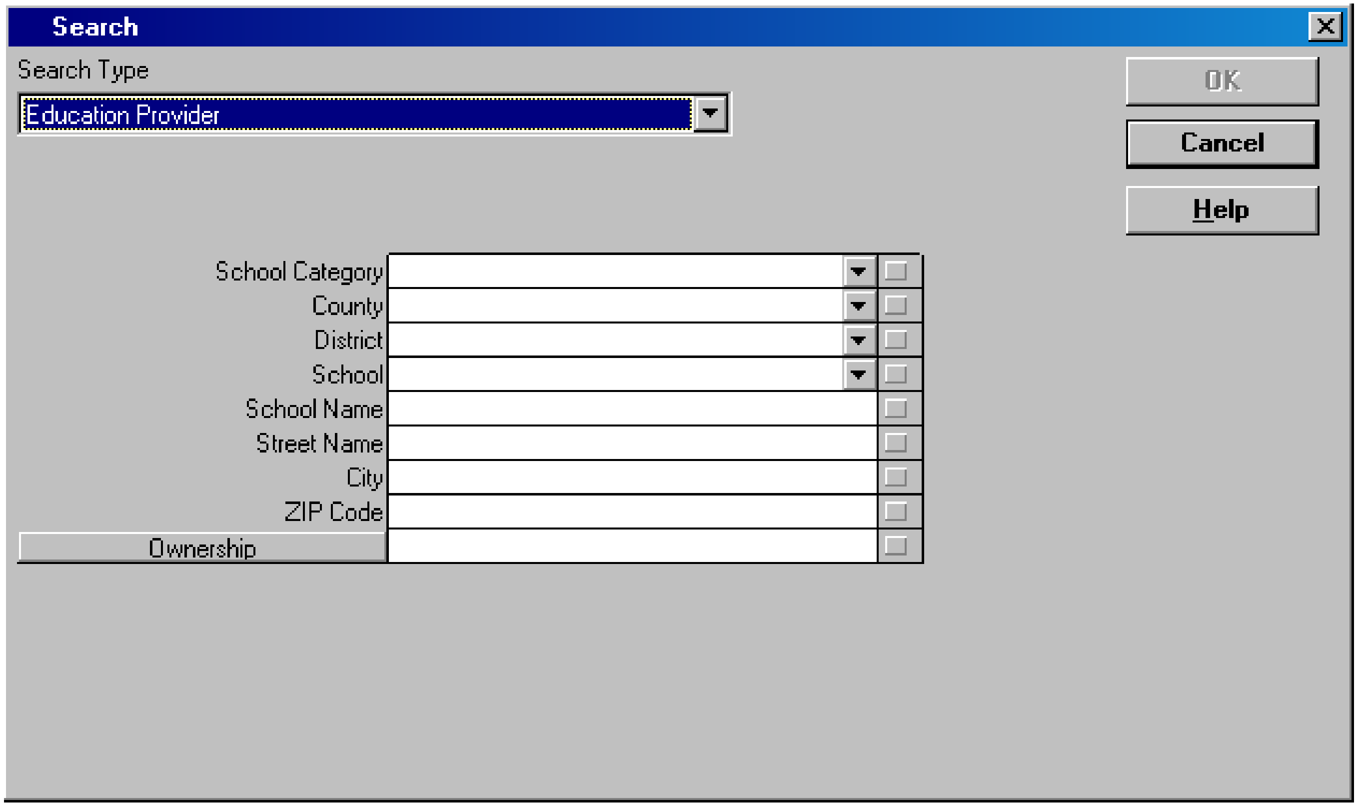
Education Notebook

Chose which notebook to complete next. In the Client Managagement Section, the next notebook, going from left to right, is the "Education" notebook. 

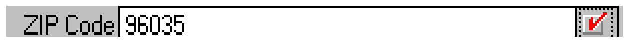
To enter a new education record for a child client, click on the "+" below the icon with the textbook and the apple. If there has already been a search for an education provider, there will be a list of choices. It is not unusual that the search has not been done. The steps to search for an "Education Provider" are basically the same as any other search. Go to the "Search" drop down menu. Select "Start Search." In the "Area of Interest," select "Education Provider."

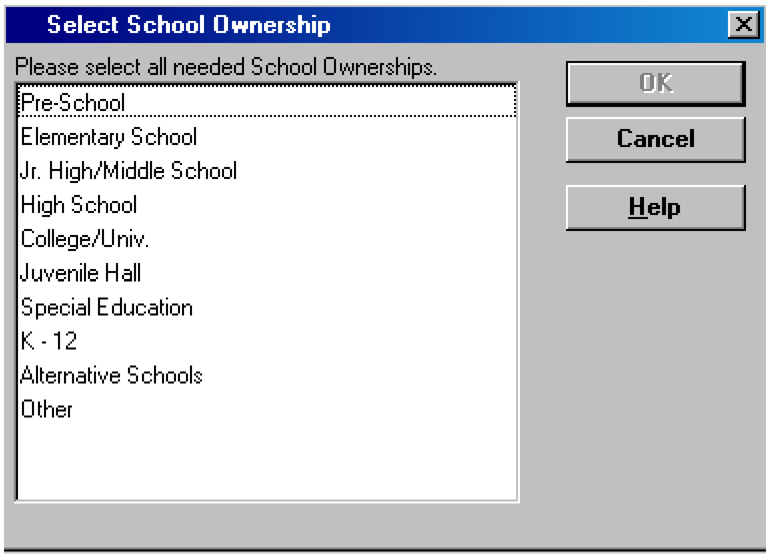
The following search dialogue box works the same as any other search dialogue box.

Search for Education Provider



There are some importance nuances with searching for an eduction provider. The recommended technique for searching is to first select the school category from the drop down ment presented when the down arrow is clicked.

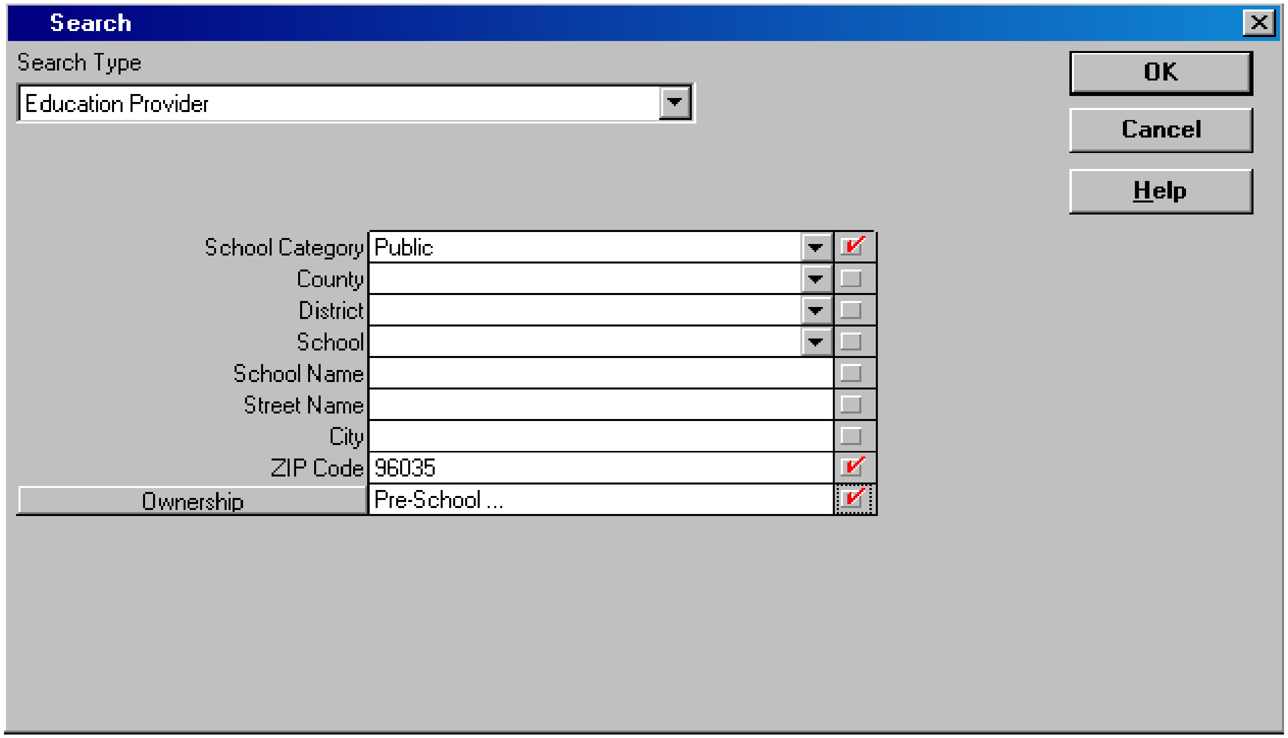
Then enter the zip code for the school. 



Then click on the "Ownership" button. 

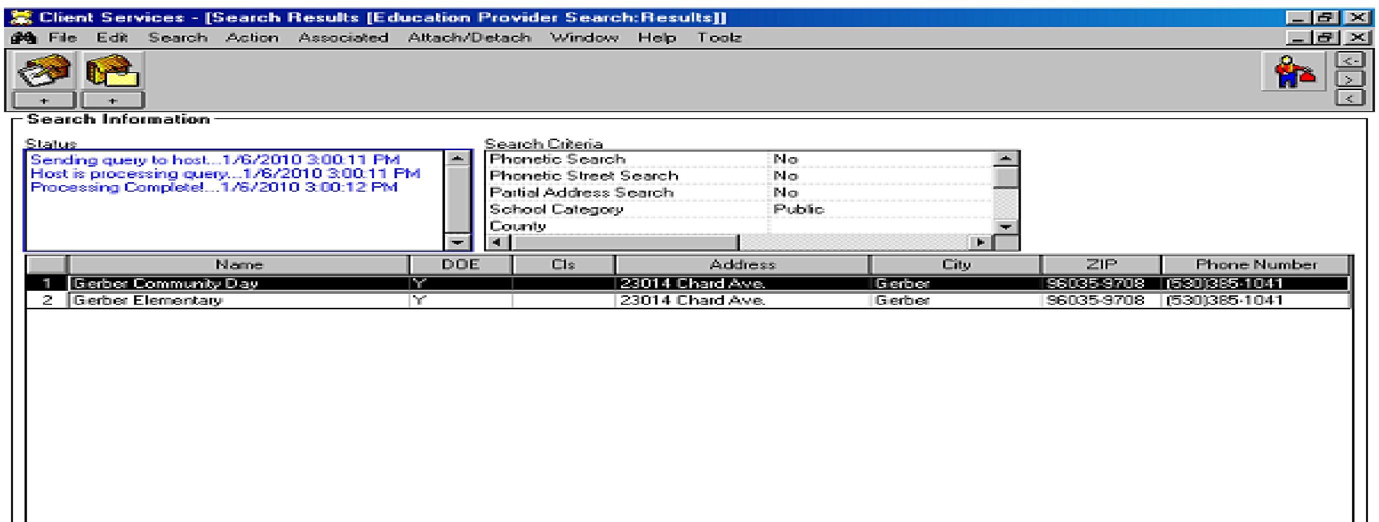
Then select the appropriate ownership or possible choices.

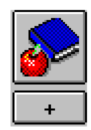
This is a multi-select window. Select all of the ownership possibilities if desired. That would result in a search for all school types in a specific zip code. Click the "OK" button in the top right of the selection box. That will return the user to the search dialogue box.

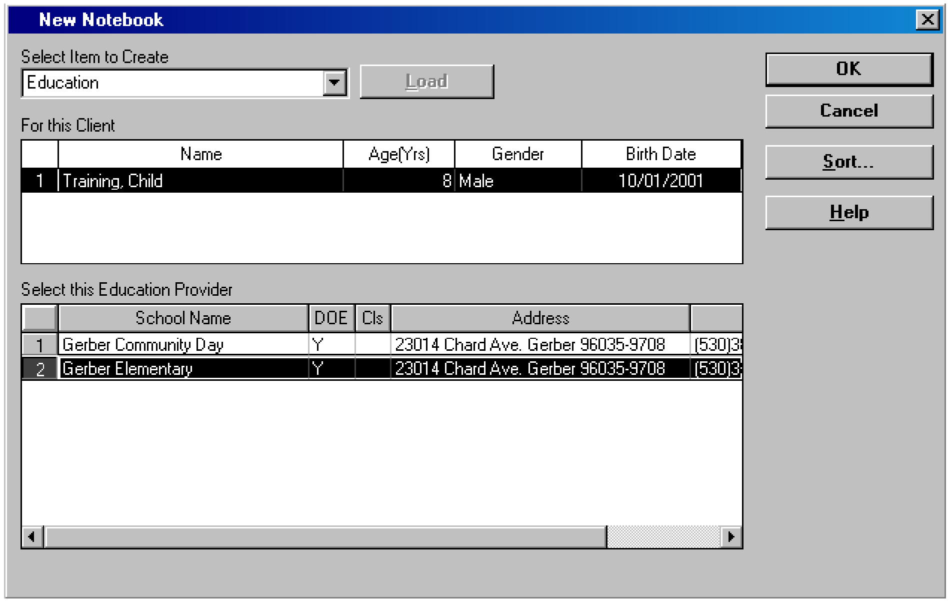


Click on the "OK" button on the top right of the search dialogue box. That will produce search results that will either show that there were no results found, or show all the education providers that meet the criteria that were entered for the search.

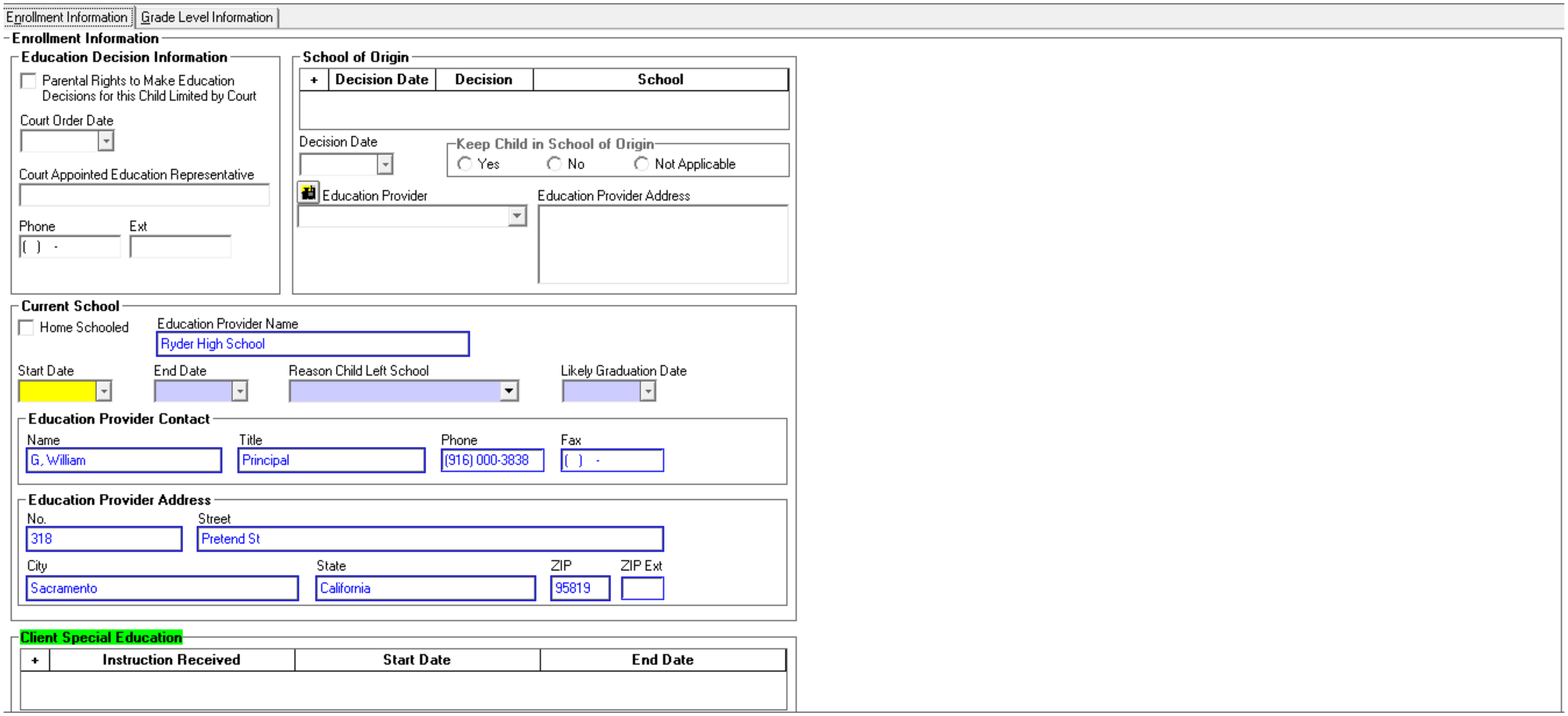
With the search completed and the desired school in the search results , enter the education information for the child. If the desired school is not found, talk to the supervisor to learn what steps to take next.



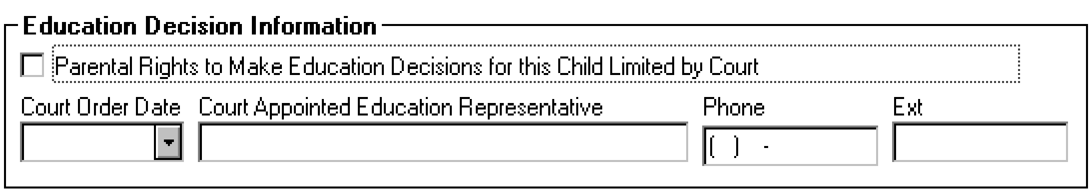
Now, or again, click on the "+" under the icon with the apple and the text book.  Select the correct school from the list in the "Select this Education Provider" dialogue box and then click the "OK" button in the top right of the dialogue box.



The application will open to a new page, "Enrollment Information." Use this page to enter information regarding this school enrollment episode. Create a "New Education" page each time the child changes schools. The "Enrollment Information" page of each Education notebook tracks all the grades in that school that the child attends.

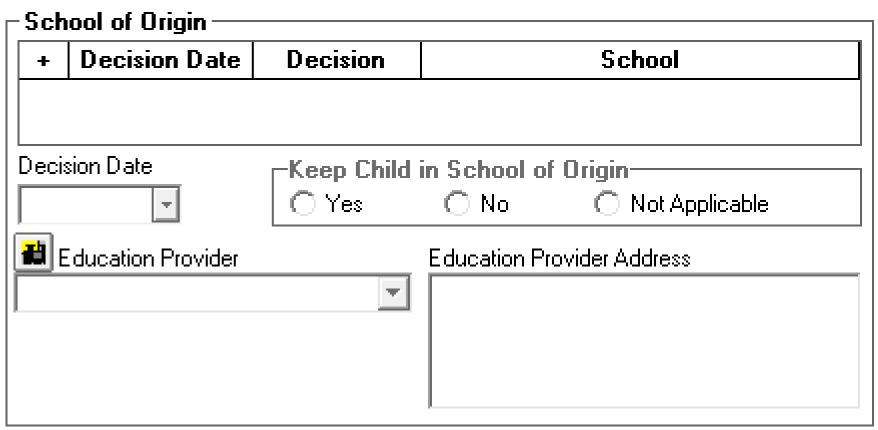


Use the "Education Decision Information" box to document that the parents' rights to make educational decisions have been limited by Court order.

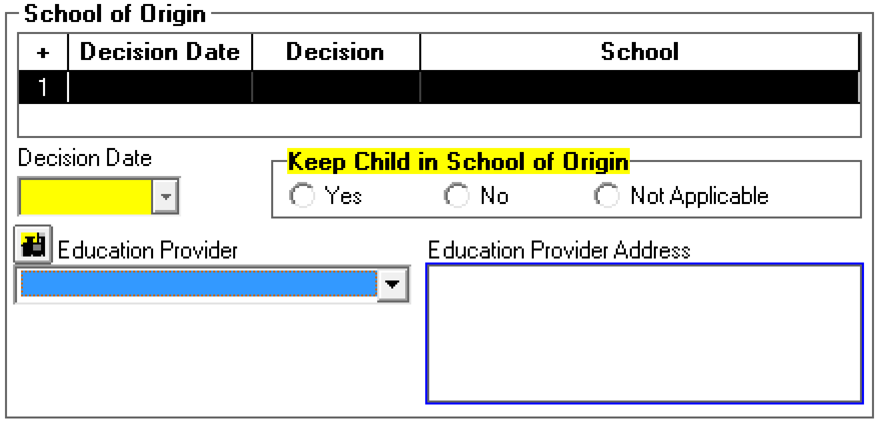


If the Court order limits the parents' rights to make educational decisions for this child, enter the date of that specific Court Order in the "Court Order Date" field. Also, check the "Parental Rights to Make Education Decisions for this Child Limited by Court" check box by clicking in the box. Record who the Court appointed as the educational representative for the child. The Court must appoint someone. It may be the attorney representing the minor, the guardian-ad litem (if not the appointed attorney), a CASA (**C**ourt **A**ppointed **S**pecial **A**dvocate), or another adult from a list provided by the local Department of Education or school. It may not be the social worker or probation officer.

Use "School of Origin" to document the school that the child was in when detained, and to indicate whether or not it is in the child's best interest to be remain in this school.



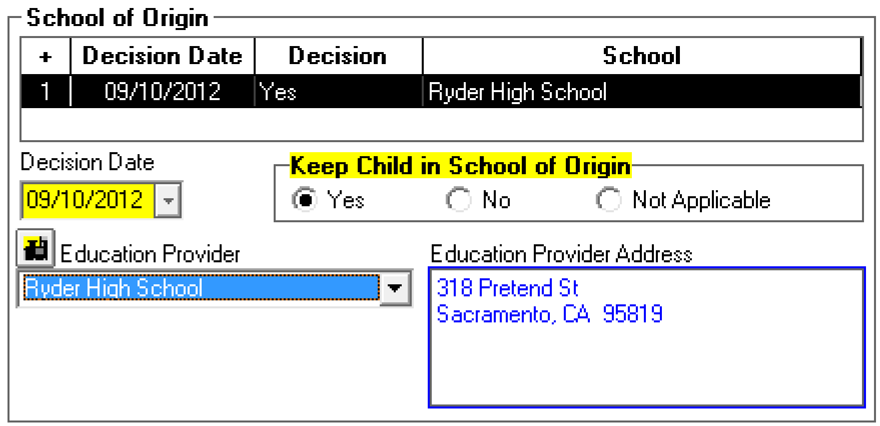
To document the decision, click on the "+" in the top left corner of the "School of Origin" information box. This will result in the following screen opening.

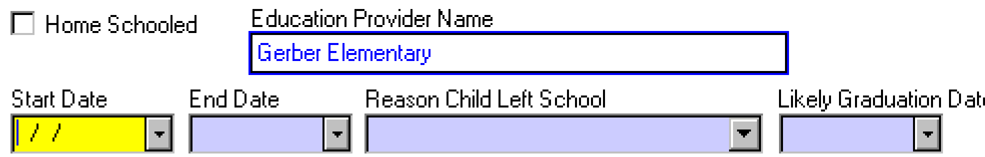


Complete the "Decision Date" and select one of the radial buttons to the right of the "Decision Date." The next step is to click on the down arrow next to the periwinkle field to select the school of origin. If no school has been entered or a current "Education Provider" search has not been completed for education providers, there will be no names in the drop down menu. Click on the binoculars to the immediate left of "Education Provider" and directly above the periwinkle line. This will result in a search dialog box with the Education Provider already selected as the type of search. Complete the school category line, the ownership line and the zip code line. That should result in a list of schools in the zip code entered. If the search was successful, there will be no further prompts from the application; click on the down arrow again, and choose from the list of schools that will now be present.

The "Education Provider Address" box will also be completed based upon the address of the provider selected for the "School of Origin."

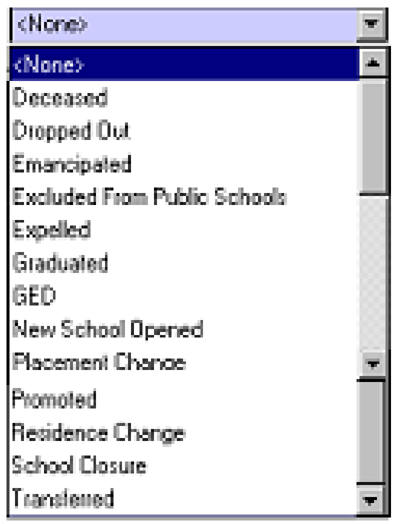
A sample representation of a completed "School of Origin" information box or frame is shown on the next page.


School of Origin
+
Decision Date
Decision
School
1
09/10/2012
Yes
Ryder High School
Decision Date
09/10/2012
Keep Child in School of Origin
Yes
No
Not Applicable
Education Provider
Ryder High School
Education Provider Address
318 Pretend St
Sacramento, CA 95819



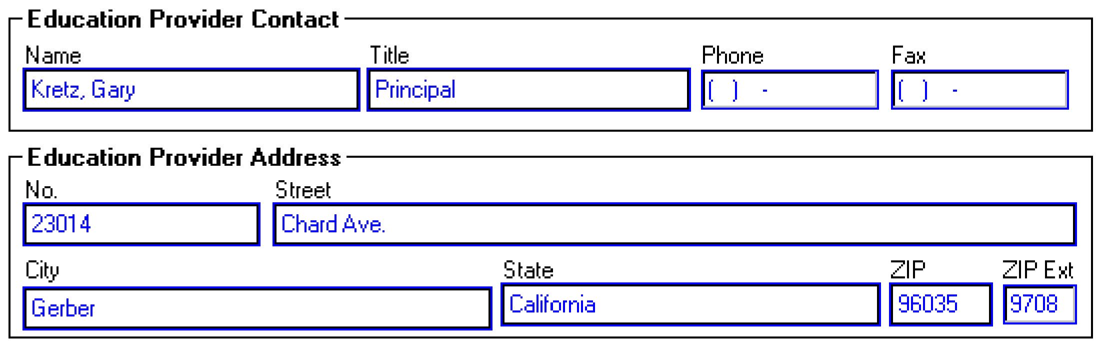
If the child is home schooled, place a check in the "Home Schooled" box by clicking on it. Enter the date that the child enrolled in the school in the "Start Date" box. When the child leaves this school, enter that date in the "End Date" box. Enter the reason the child left the school from the dropdown menu in the "Reason Child Left School" field.

This is the complete list of options.

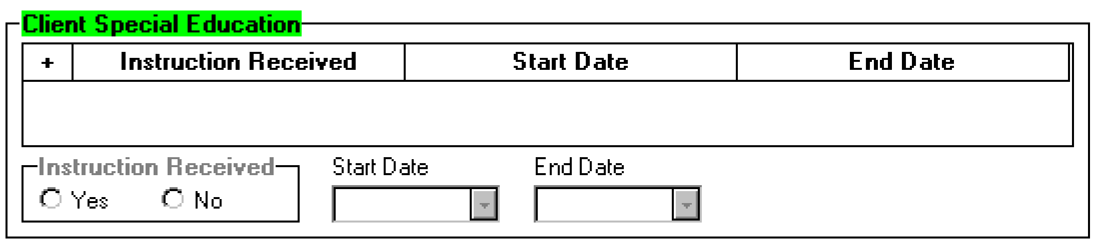


Estimate when the child is likely to graduate from this school and enter that date in the "Likely Graduation Date" field.

The next two information boxes on the page, "Education Provider Contact" and "Education Provider Address" are automately completed by the application, and there is no user data input. This information is based upon the school the user selected when creating this education episode.



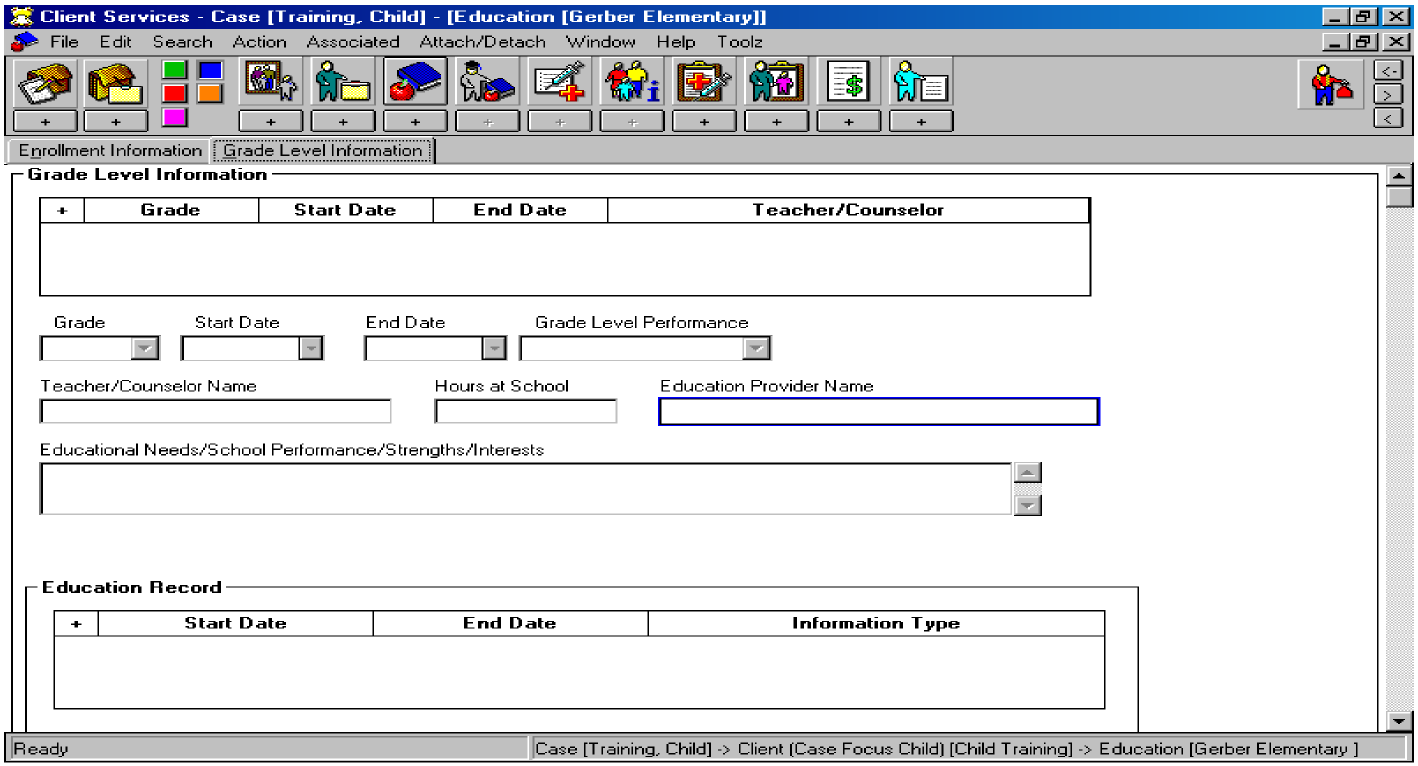
Use the next two information boxes to record information regarding a child client who is receiving Special Education Services. In the first information box, the user may enter the date span that the child client received special education. Click on the "+" in the left corner of the grid and complete the mandatory information.



Be sure that the needs are "Special Education" needs, not regular school needs. In order for there to be a Special Education need, the child must be evaluated by the school and determined to be a special education child through an IEP (**I**ndividualized **E**ducational **P**lan)" process.

Document whether or not the child client has completed at least one semester of college or attended postsecondary training by selecting the appropriate yes or no answer for each set of radial buttons. If possible, answer each question for each child client.

The second page, "Grade Level Information," is for information regarding each grade the child attended while at this school. The next page indicates the process for entering the information above.

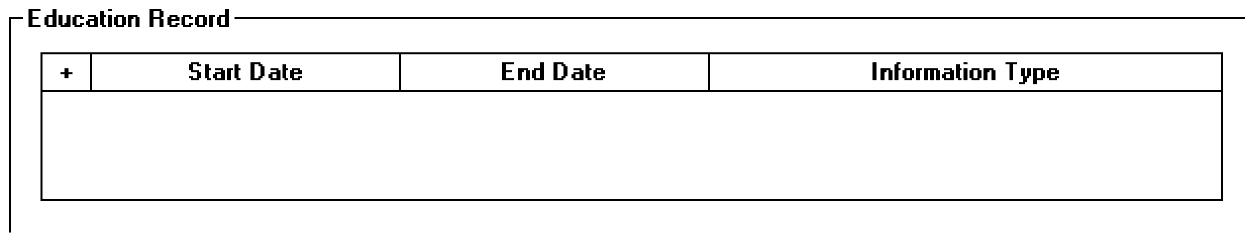


Enter the child's teacher or counselor in the "Teacher/Counselor Name" field. It is usual to have a single teacher in elementry school, then as the child goes to Jr. High or High School, he or she would have a counselor. Enter the hours the child is at school. The "Education Provider Name" will default to the name of the school that is the education provider and cannot be edited.

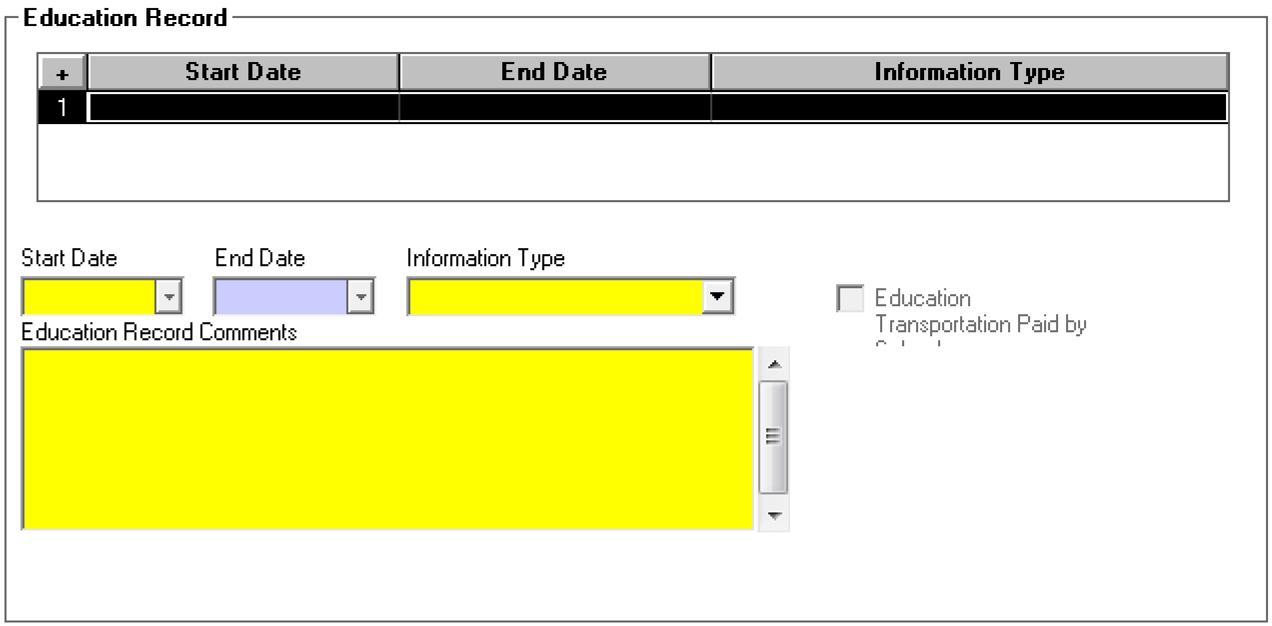
Use the "Educational Needs/School Performance/Strengths/Interest" narrative field to enter information regarding any needs the child has in school, such as tutoring. Also, list any information regarding school performance or strengths. Document any special interest the child has, such as school clubs, sports or other activities the child is involved in at school.

This field has only 180 characters available for text.

To enter informtion in the "Education Record" grid, start by clicking the "+" in the top left corner of the grid.



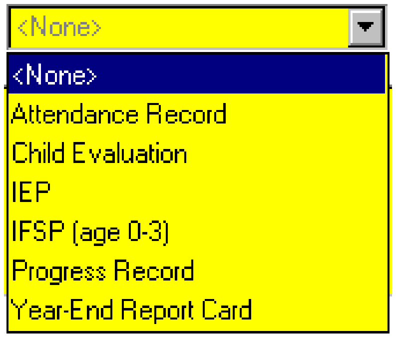
That will result in the following.



Remember that the yellow fields are mandatory and must be completed before the work can be saved. The periwinkle field is being used for the collection of data for Outcome Measures and should be completed if at all possible.

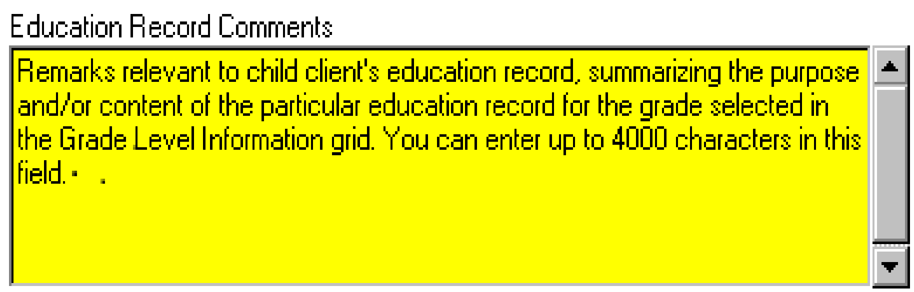
Complete the "Start Date" by entering the starting date for this educational record. It may not be the same as the date the child entered that grade or started attending that school. The "End Date" should be entered when that specific educational record ends, as with a report card recording a specific segment of time.

Enter the "Information Type" by choosing one of the options in the dropdown menu when the down arrow is clicked.

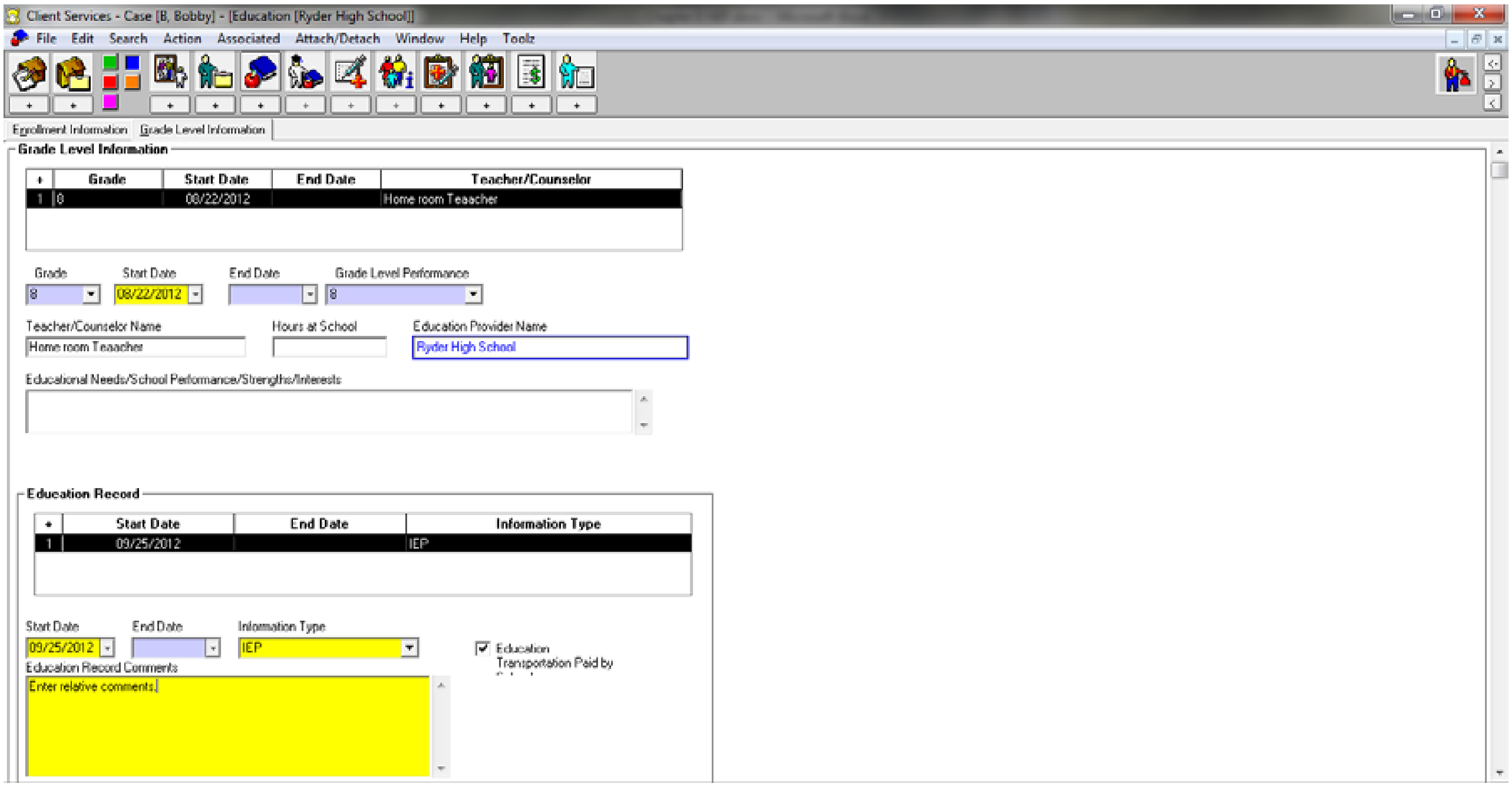


Note that when "IEP" is selected, the "Education Transportation paid by School" field becomes enabled. If the school is providing the transportaion for the special education for the child, click on this box

Finally, complete the "Education Record Comments" narrative field as shown below.



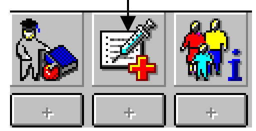
This completes the data entry process for the educational record for the child client. The following is a completed page.



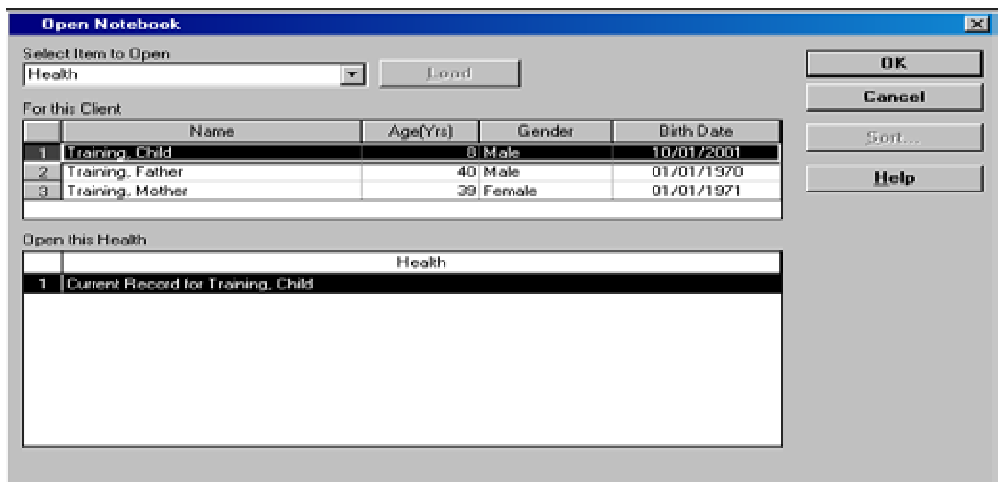
Client Services - Case [B, Bobby] - [Education [Ryder High School]]
File Edit Search Action Associated Attach/Detach Window Help Toolz
Enrollment Information Grade Level Information
Grade Level Information
Grade Start Date End Date Teacher/Counselor
1 8 08/22/2012 Home room Teaacher
Grade Start Date End Date Grade Level Performance
8 08/22/2012 8
Teacher/Counselor Name Hours at School Education Provider Name
Home room Teaacher
Ryder High School
Educational Needs/School Performance/Strengths/Interests
Education Record
Start Date End Date Information Type
1 09/25/2012 IEP
Start Date End Date Information Type
09/25/2012 IEP
Education Transportation Paid by
Education Record Comments
Enter relative comments.

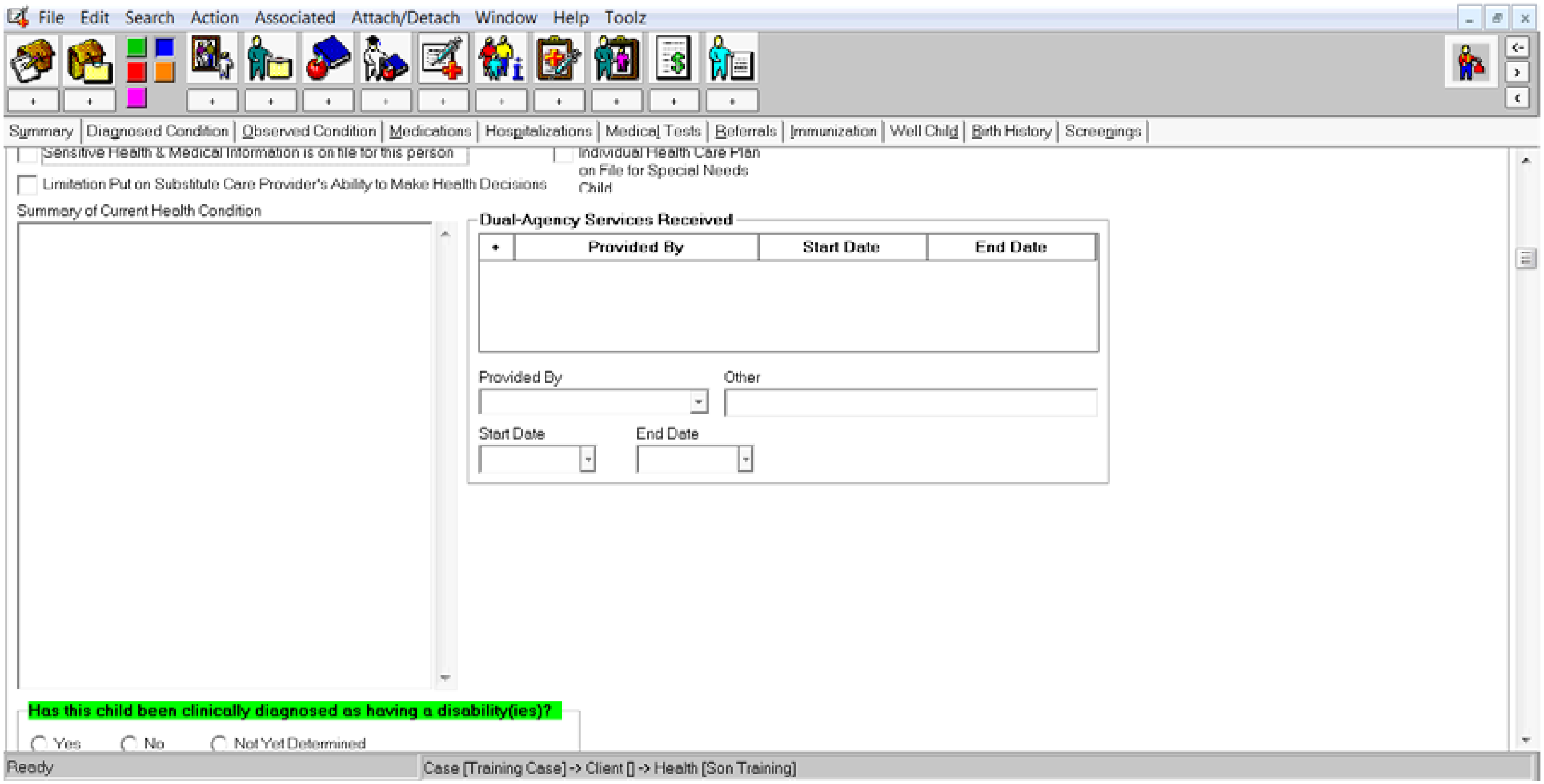
Existing Health Notebook

The next notebook to complete is the child's "Existing Health" notebook. It is the icon with the red cross, syringe, and tablet.



Open the client's health notebook by clicking on the "Open Existing Health" icon shown above. Select which client's notebook to open by clicking on the appropriate client and then clicking "OK" in the selection dialogue box.

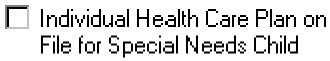




Above is the first page in the Health notebook.

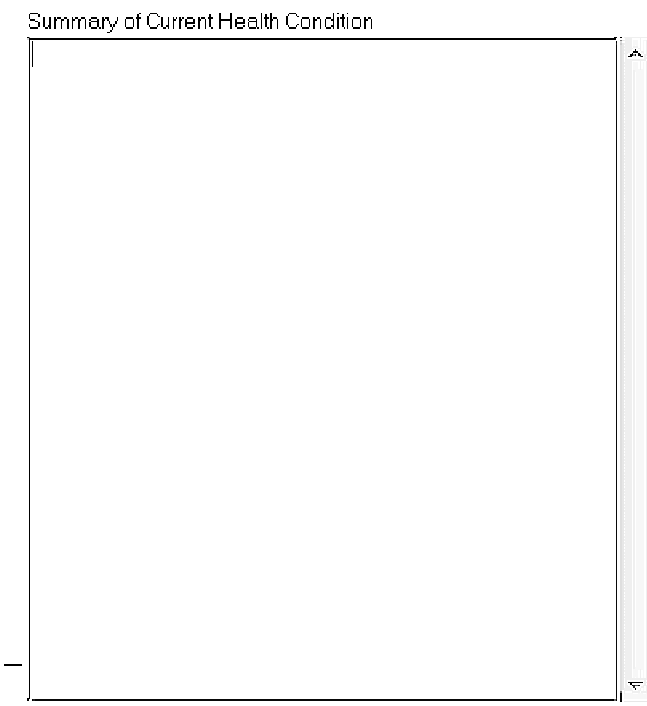
Click on the elements that are true for the specific client. There is a narrative text box and one information box that is coded with green.

Click this box when sensitive health information is kept in a paper file rather than in the database.



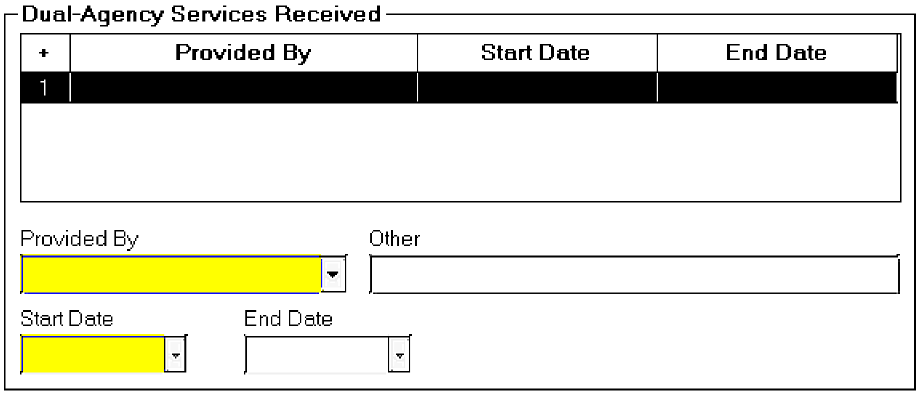
Click this box when an individual health care plan is on file indicating this child client as a special needs child.

Click this box when a SCP has been limited in making health decisions for the child client.



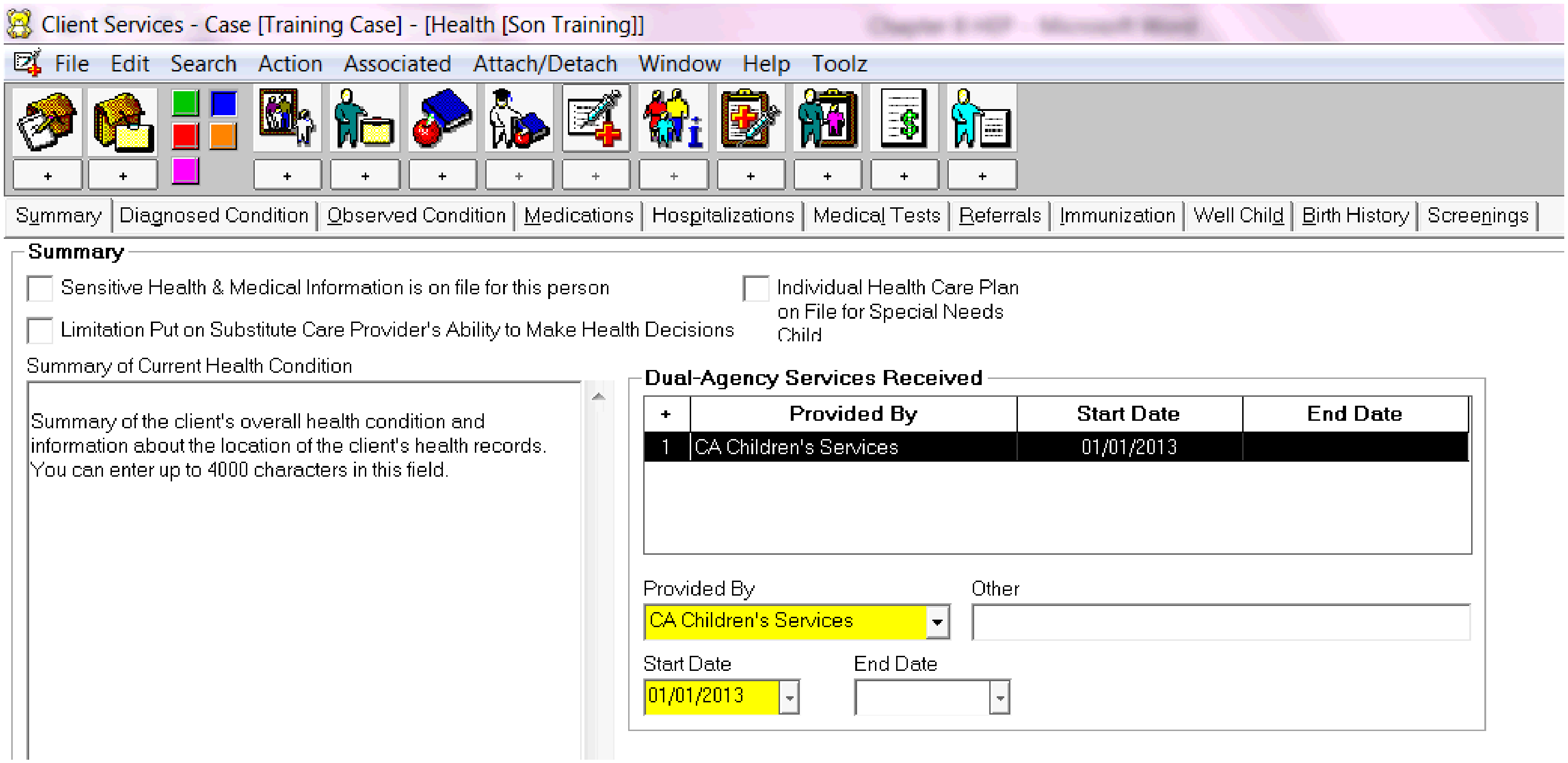
Use this box to create and update a summary of the client's overall health condition and information about the location of the client's health records. You can enter up to 4000 characters in this field.

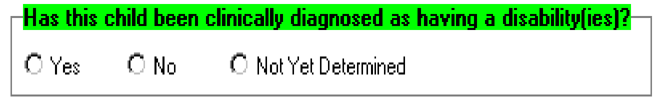
To the immediate right of the summary field is an information box titled “Dual-Agency Services Received.”



Users document any services received by this client from “CA Children’s Services”, “Regional Center” or “Other”. Click on the “+” in the top left corner of the grid and complete the “Provided By” fields and dates as appropriate. If “Other” is selected from the “Provided By” dropdown menu, the “Other” field becomes a mandatory field and must be completed. The “Historical Information” frame is read-only. It will reflect data entered in earlier versions of CWS/CMS.

A representive sample of a completed summary page is featured on the following page.


Client Services - Case [Training Case] - [Health [Son Training]]
File Edit Search Action Associated Attach/Detach Window Help Toolz
Summary | Diagnosed Condition | Observed Condition | Medications | Hospitalizations | Medical Tests | Referrals | Immunization | Well Child | Birth History | Screenings
Summary
Sensitive Health & Medical Information is on file for this person
Limitation Put on Substitute Care Provider's Ability to Make Health Decisions
Individual Health Care Plan on File for Special Needs Child
Summary of Current Health Condition
Summary of the client's overall health condition and information about the location of the client's health records. You can enter up to 4000 characters in this field.
Dual-Agency Services Received
Provided By
Start Date
End Date
1
CA Children's Services
01/01/2013
Provided By
CA Children's Services
Other
Start Date
01/01/2013
End Date

The final element of this page is the box with the green heading. 

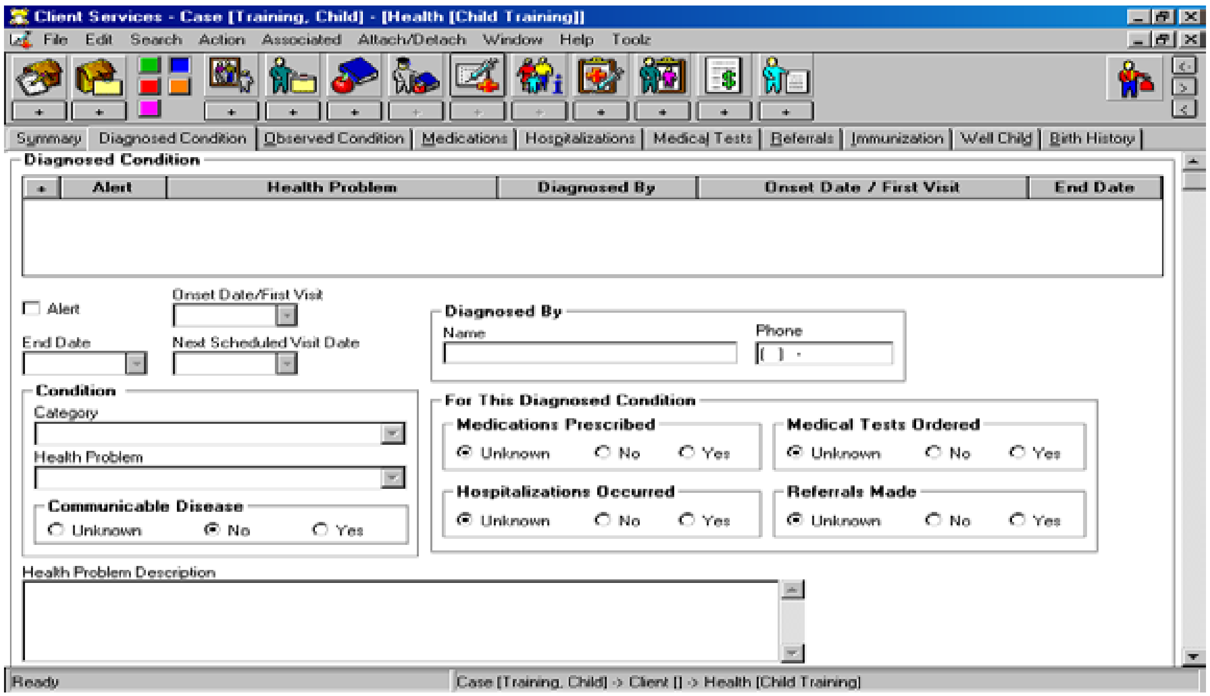
This box requires an answer. One of the three radial buttons should be clicked. The green signifies that this is AFCARS reported data and should be completed if possible. AFCARS is an acronym for **A**doption and **F**oster **C**are **A**nalysis and **R**eporting **S**ystem.

The disabilities specifically to be documented for AFCARS reporting are; "Mental Retardation", "Visual or Hearing Impairment"," Physical Disability" and "Other Medically Diagnosed Conditions Requiring Special Care". The user should select the "Yes" answer if any of these conditions exist, or the "No" answer if the conditions do not exist. If the conditions exist, enter them as a diagnosed condition on the next page.

Complete the health notebook and its fields as appropriate to the specifics of the child client. The summary information narrative should be filled out in as normal English as possible. Too many medical terms would make the field hard for non-medical professionals to read or fully understand.

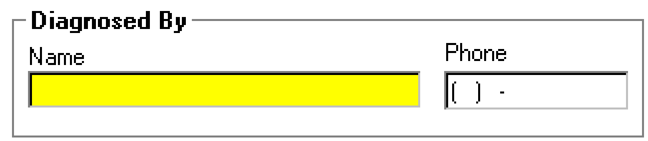
Diagnosed Conditions Page

This page is used to record health conditions that have been diagnosed by Medical Professionals. The person completing this page can also record previously diagonosed health issues. The page has the functionality to allow marking a condition as requiring extra care and can place this condition in a special section of the HEP.

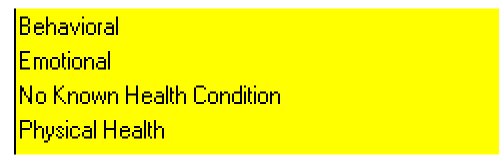


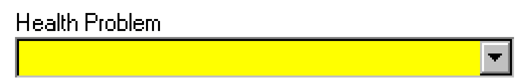
Click the "+" in the top left corner of the grid on the page. This will enable the fields so data can be entered. There are four mandatory fields on the page. The first is the "Onset Date/First Visit" field. 

This calendar is not limited. Enter the initial date even if that date is prior to the referral or case dates.

The second mandatory field is regarding who made the diagnosis. 

The user types the name of the medical professional who made the diagnosis. If available, enter the phone number to reach the medical professional. The last mandatory field is "Category." 

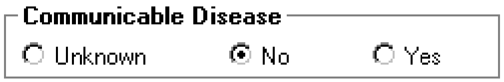
Select the category from the dropdown list. There are four possible choices in this field. 

Each of the conditions has a dropdown menu of possible problems within that condition. 

Once a category is selected, it becomes a mandatory field.

The "Behavioral" category has approximately 37 problems, the "Emotional" category has approximately 25 problems, and the "Physical Health" category has approximately 145 problems in the dropdown menu.

Use the "Communicable Disease" information box to record if the health problem is communicable.

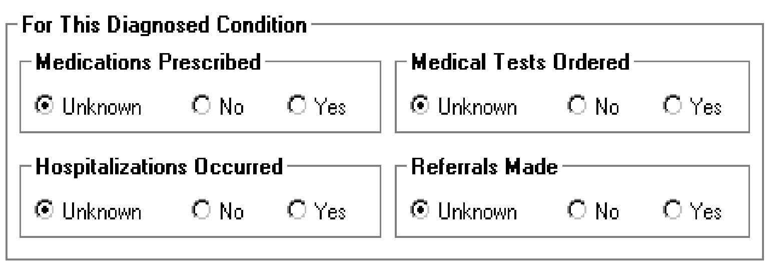


To flag this condition as having a special aspect and/or needing special attention, use the "Alert" 

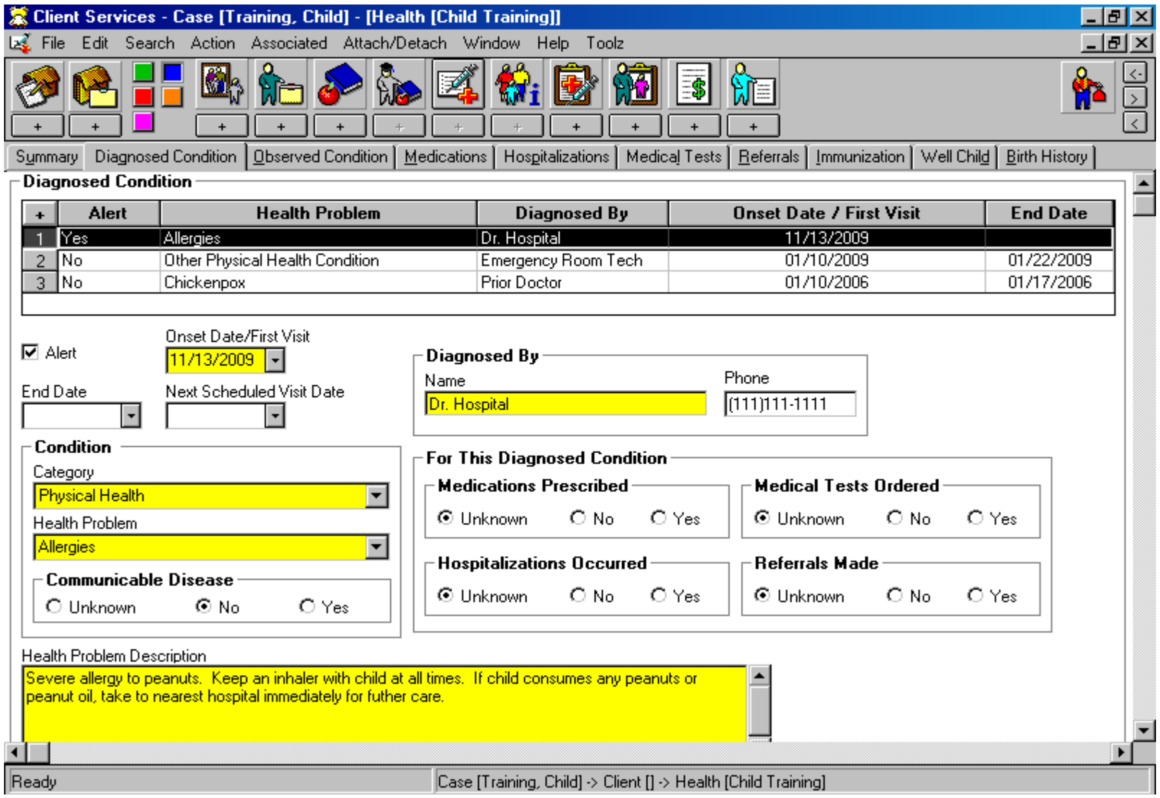
check box. It is located to the left of the "Onset Date/First Visit" data field.

Use this narrative field to add any additional description necessary for this condition. It becomes a mandatory field if one of the "other" choices is selected as a problem for the category.

The final element on this page is the "For This Diagnosed Condition" information box. It has four separate specific information boxes within in. Each of these boxes has its own name and three radial button to chose from. "Unknown" is the default condition. The only other choice availble to the entry person from this page is "No." The "Yes" radial button can only be

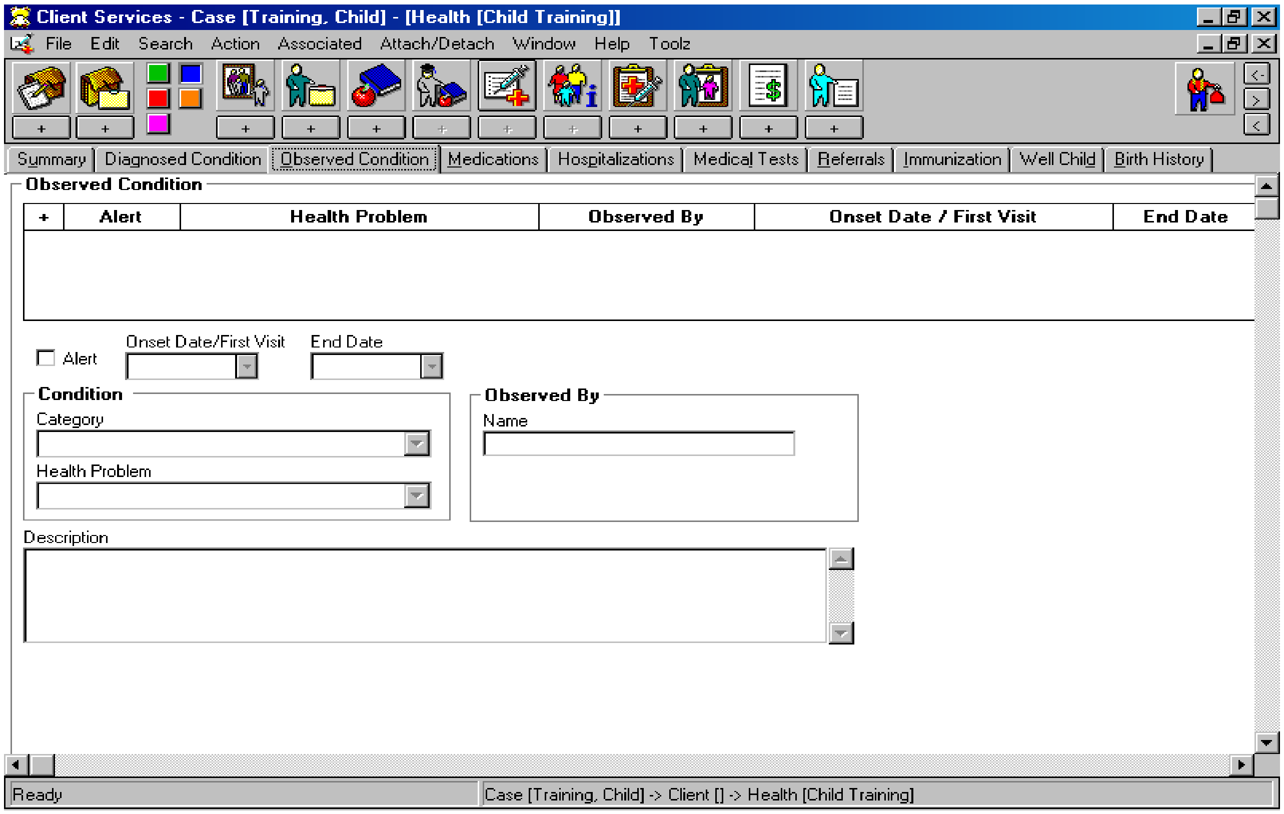


selected by going to the one of the four pages these information boxes represent and entering the information in that page.

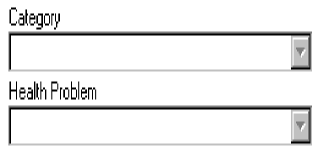


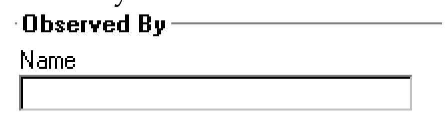
Above is a completed "Diagnosed Condition" page with three entries. **Note the alert on peanut allergy.**

Observed Condition Page



Data is entered on this page exactly like data was entered on the "Diagnosed Conditions" page. Click the "+" in the top left corner of the grid. Enter a "Start Date/First Visit" date in the appropriate field. 

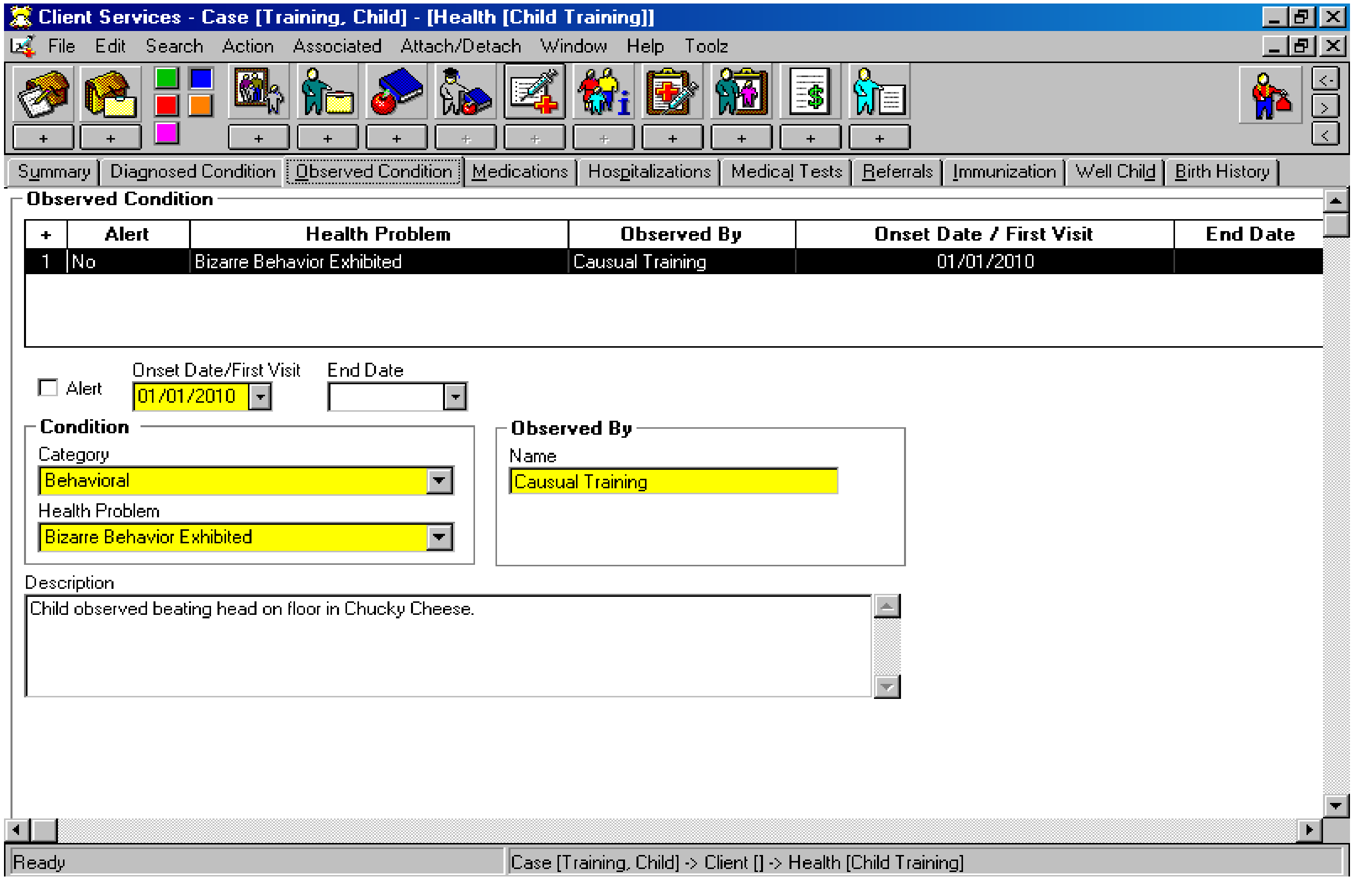
Select a "Category," then a "Health Problem." 

These are the same selections as for "Diagnosed Conditions." Next, type the name of the individual who reported the condition to the department or worker. The major difference is that there is no restriction as to who may observe a condition. The only application or practice restriction is that the user knows who observed the condition. 

After clicking the "+" in the top left corner of the grid, these fields will all become mandatory fields and must be completed before the data can be saved.

The last element on this page is the "Description" narrative box. It can contain up to 4,000 characters. Use this narrative field to add any additional description necessary for this observed condition.

The next page demonstrate a completed "Observed Condition" page.

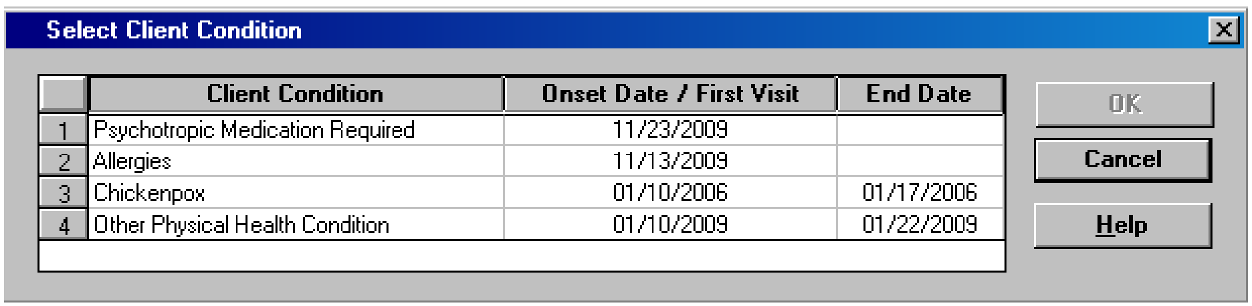

Client Services - Case [Training, Child] - [Health [Child Training]]
File Edit Search Action Associated Attach/Detach Window Help Tools
Summary
Diagnosed Condition
Observed Condition
Medications
Hospitalizations
Medical Tests
Referrals
Immunization
Well Child
Birth History
Observed Condition
+ Alert Health Problem Observed By Onset Date / First Visit End Date
1 No Bizarre Behavior Exhibited Causual Training 01/01/2010
Alert
Onset Date/First Visit
01/01/2010
End Date
Condition
Category
Behavioral
Health Problem
Bizarre Behavior Exhibited
Observed By
Name
Causual Training
Description
Child observed beating head on floor in Chucky Cheese.
Ready
Case [Training, Child] -> Client [] -> Health [Child Training]

Medications Page

The next four pages, "Medications," "Hospitalizations," "Medical Tests" and "Referrals," all require a diagnosed condition entered on the "Diagnosed Conditions" page prior to allowing data entry. The first page of the four is the "Medications" page.

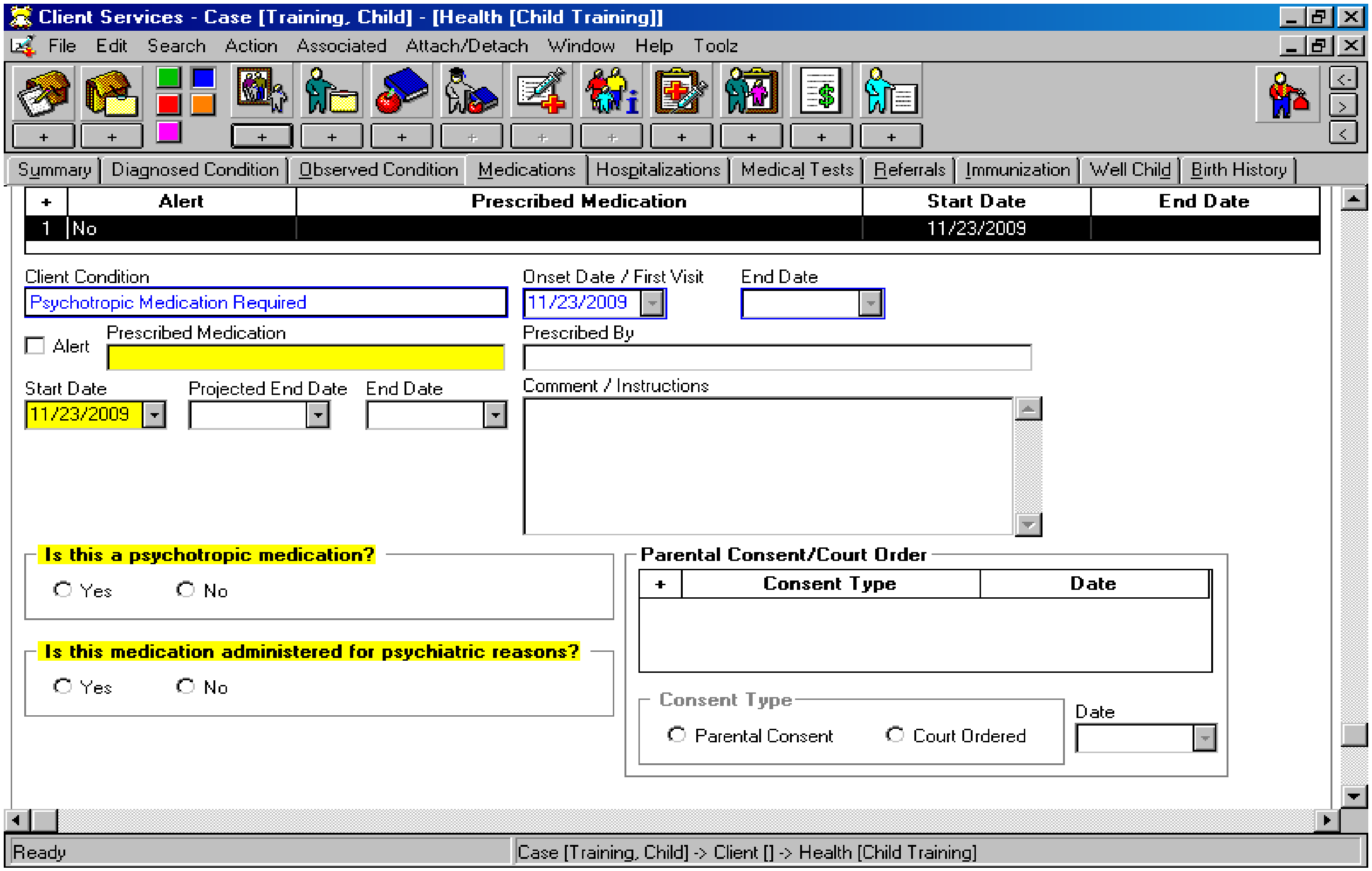
Use this page to view or enter a child client's prescribed medications. This page is not available unless the client is either a case focus child or a referral client named as the victim in an "Allegation" notebook.

As with all grids in CWS/CMS, to enter data in the grid, click the "+" in the top left corner of the grid. Next, select the diagnosed condition for which the child's medication is being used.

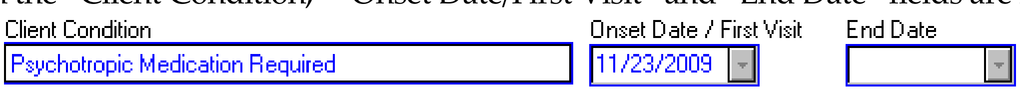

Select Client Condition

	Client Condition	Onset Date / First Visit	End Date
1	Psychotropic Medication Required	11/23/2009	
2	Allergies	11/13/2009	
3	Chickenpox	01/10/2006	01/17/2006
4	Other Physical Health Condition	01/10/2009	01/22/2009

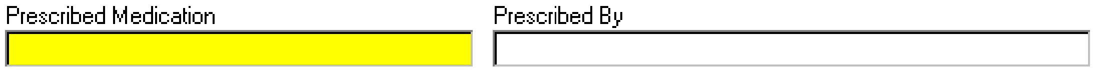
Select the correct diagosed condition by clicking on it and then clicking on the "OK" button to the right. The page will now open as shown below.



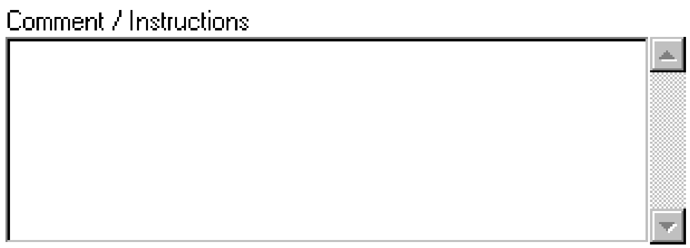
The data in the "Client Condition," "Onset Date/First Visit" and "End Date" fields are read-only and cannot be changed from this page.



Enter the medication in the “Prescribed Medication” field and document the prescribing doctor in the “Prescribed By” field.



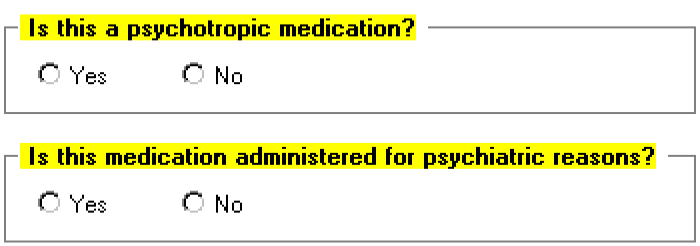
The “Start Date” is a mandatory field. It will default to the onset date of the selected condition but can be changed to predate the condition. Use the “Projected End Date” to record an anticipated ending date for the medication if there is one. Use the “End Date” to record the actual date the medication was ended.



Use the “Alert” check box Alert in the same manner as the alert in the “Diagnosed Condtion” page.

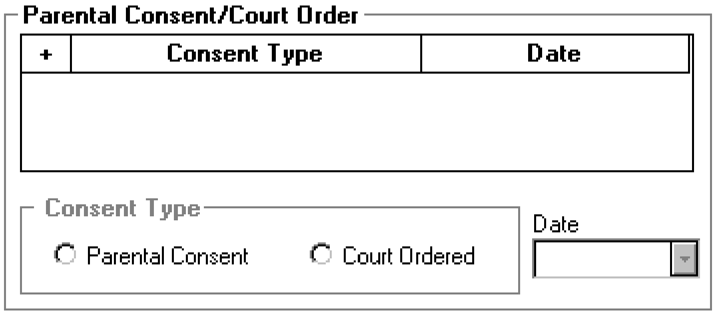
Use the “Comments/Instructions” narrative box to make remarks relevant to the medication selected in the Medications grid, such as a reason for the prescription, usage instructions and/or foods to avoid. Note whether the prescribed date differs from the date that the client actually began taking the medication. This field allows up to 254 characters.

The next two data fields are very closely related and are stacked rather than side-by-side.



Both are mandatory and “Yes” or “No” must be selected for each.

The last element of this page is the "Parental Consent/Court Order" information box.



This must be completed for psychotropic medications. If the child has been named a Dependent of the Court, there must be a Court Order to give the child the medication. Prior to the child being named a dependent, only parental consent is necessary. There is a legal process and specific forms that must filed with the Court prior to the Court making the order. Some of the forms are completed by the prescribing doctor; some blank forms are provided to the parents and the parents' attorney(s). Closely follow county procedures in this process.

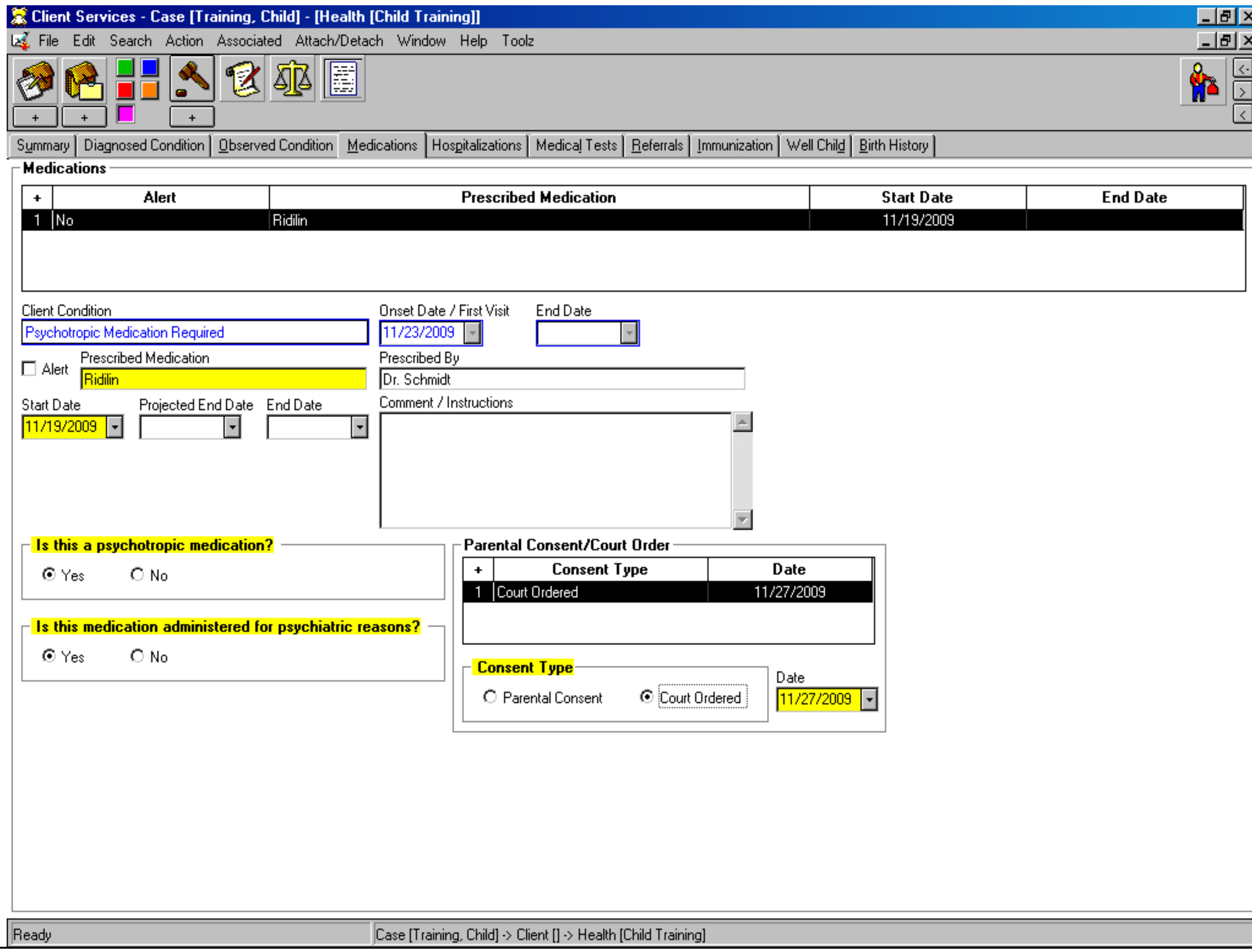
Tip: If the child is receiving psychotropic drugs at the time of removal, start the process prior to the disposition hearing.

It is possible the Court will order the parent have the right to consent. This is still a Court order, and should be recorded as such.

To enter a date in this information box, click the "+" in the top left corner of the grid. The "Consent Type" and "Date" become mandatory.

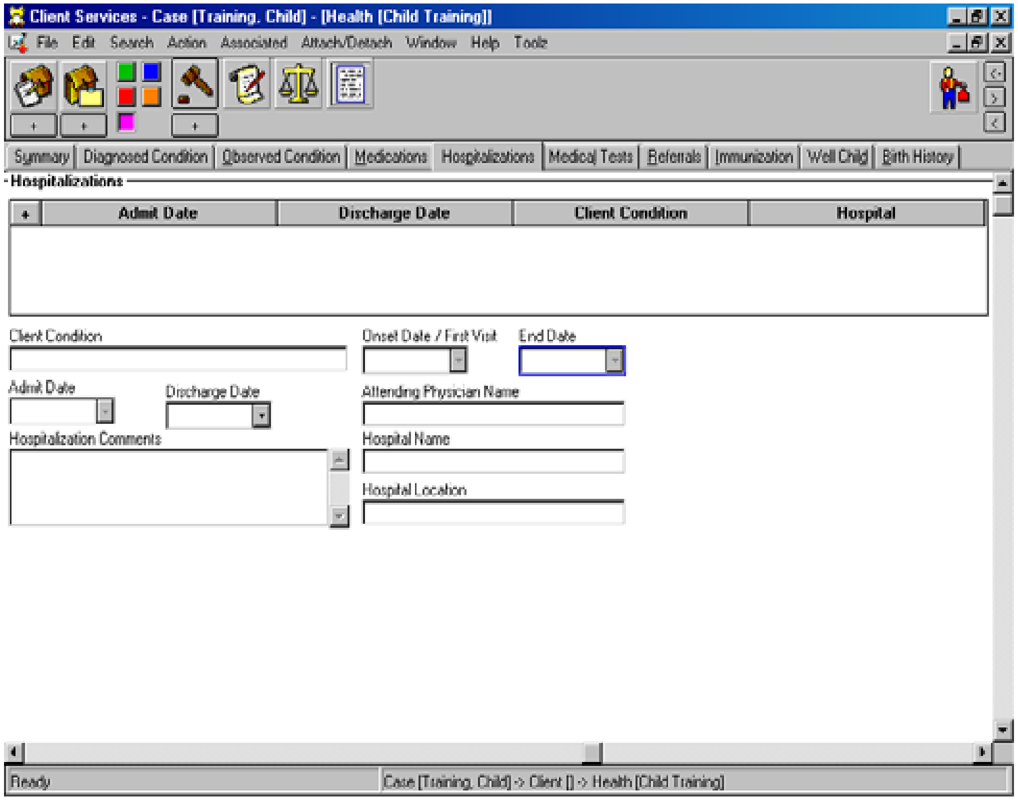
Document the type of consent by selecting one of the radial buttons, then enter the date of the consent or order.

A completed "Medications" page is shown below.

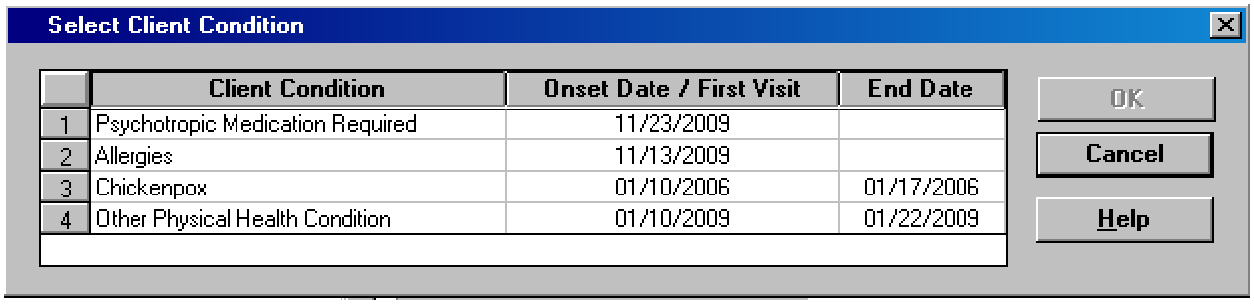


Hospitalization Page

This page records information about any hospitalizations.



Again, click the "+" in the top left corner of the grid to enter information on this page.



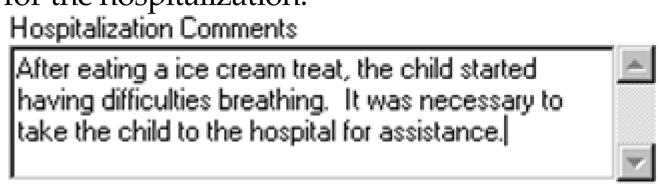
Select the condition for which hospitalization occurred (in this case, "Allergies" will be selected). Then, click on the "OK" button.

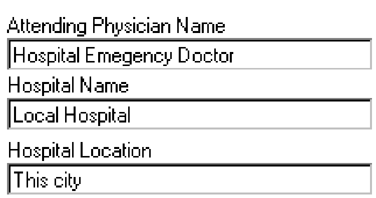
The "Admit Date" field is the only mandatory field on this page. 

It will default to the "Onset Date/ First Visit" value on the diagnosed condition page, but the date is can be edited to reflect the actual date of the hospitalization.

Complete the "Discharge Date" field 

and the "Hospitalizations Comments" narrative box to document reasons for the hospitalization.





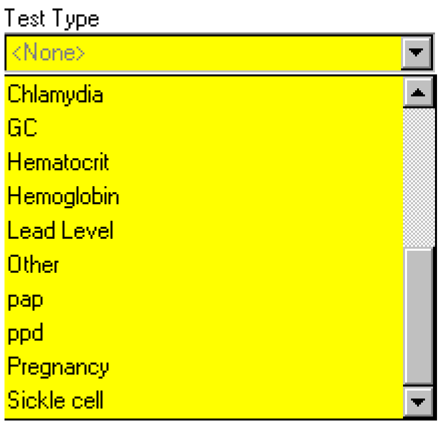
Finally, complete the remaining three fields: "Attending Physician;" Hospital Name;" and "Hospital Location." This completes the "Hospitalizations" page.

Medical Tests Page

The third page in the series of four shares many of the same characteristics. Clicking the "+" in the top left corner of the grid allows the selection of a client condition. After selecting the appropriate condition, there are two mandatory fields on the page.

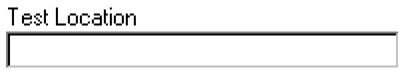
The first is "Test Date." 

It also defaults to the date entered on the "Diagnosed Conditions" page. If necessary, change it to the appropriate date. The second mandatory field is a dropdown menu: "Test Type." Select one of the options in the dropdown menu after clicking on the down arrow.

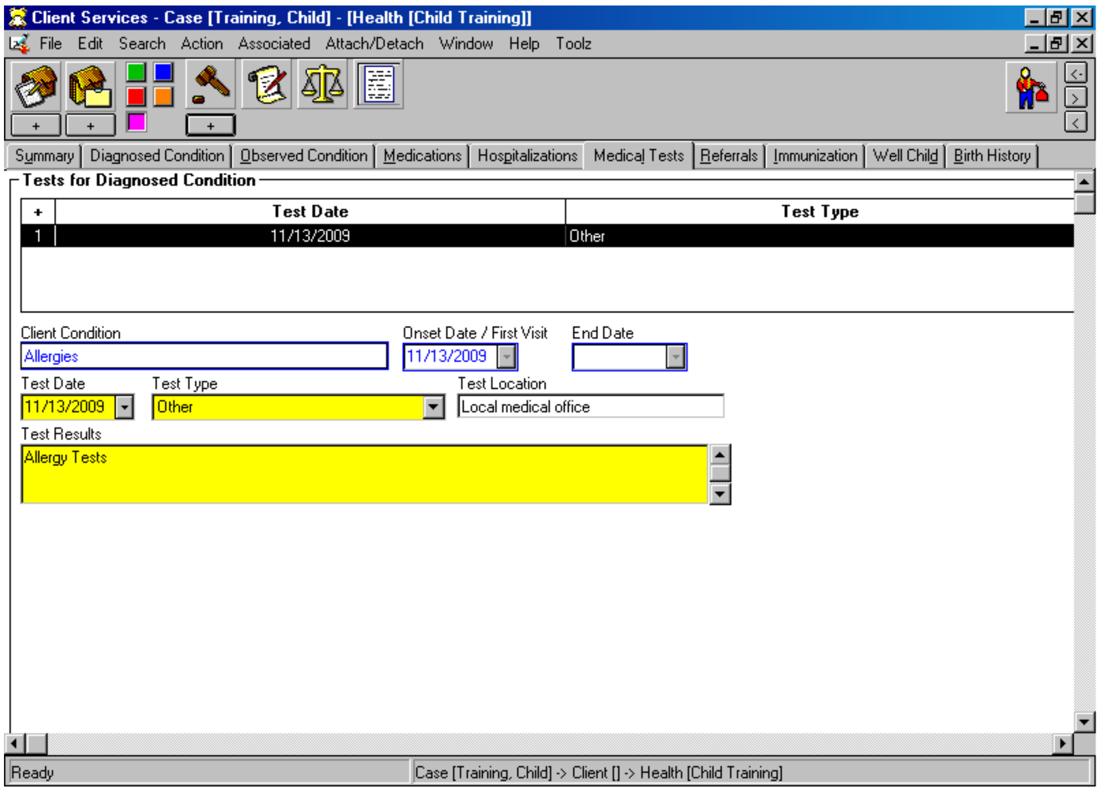


This is the complete list.

Tip: If the list and the selection are known, instead of clicking on the down arrow, type the first letter of the selection. The application will complete the selection line with the first selection that starts with the letter. If that is not the correct selection, use the down arrow on the keyboard to scroll through the list until the correct response is listed.

Complete the "Test Location" field  if available.

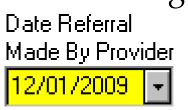
A sample of the "Medical Tests" page is illustrated below.



Referrals Page

The final of the four related pages is the “Referrals” page. Use it to document what conditions led to the referral, the provider that made the referral for the client, the provider that the client was referred to, the reason for the client referral, the date the referral was made, the date the referral was processed, and the date the referred child was seen by the medical professional in the referral.

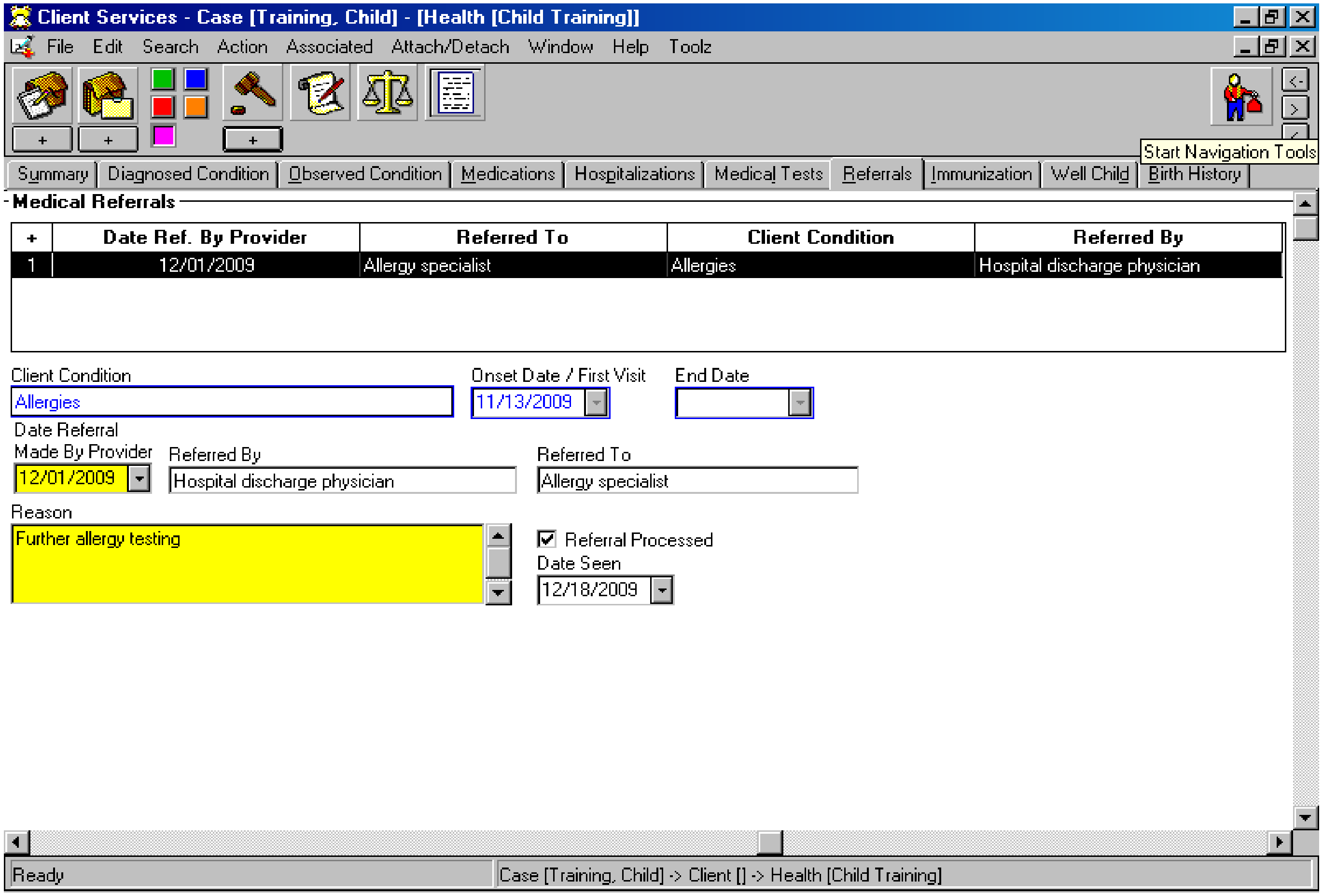
After clicking on the “+” and selecting the appropriate condition, confirm or correct the “Date Referral Made By Provider” field.



Complete the “Referred By” and “Referred To” data fields.

Explain the purpose for the referral in the “Reason” narrative field. This field will allow only 254 characters. Enter the date the client was seen for his or her referral in the “Seen Date” field.

A sample of the completed page follows.

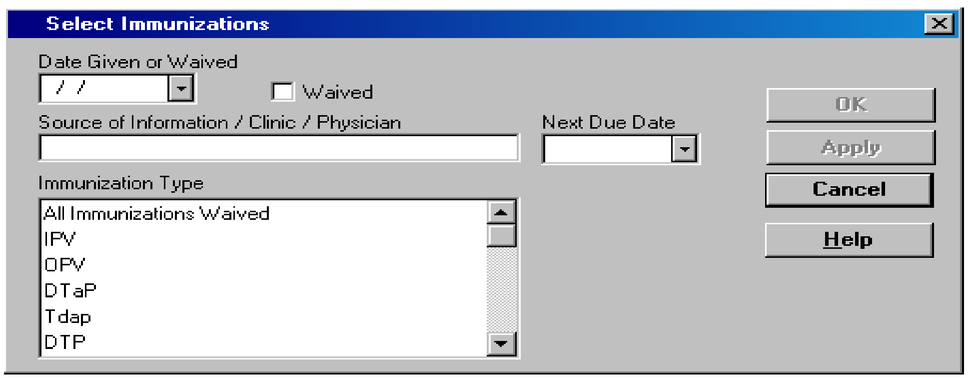

Client Services - Case [Training, Child] - [Health [Child Training]]
File Edit Search Action Associated Attach/Detach Window Help Toolz
Start Navigation Tools
Summary Diagnosed Condition Observed Condition Medications Hospitalizations Medical Tests Referrals Immunization Well Child Birth History
Medical Referrals
+ Date Ref. By Provider Referred To Client Condition Referred By
1 12/01/2009 Allergy specialist Allergies Hospital discharge physician
Client Condition
Allergies
Onset Date / First Visit
11/13/2009
End Date
Date Referral Made By Provider
12/01/2009
Referred By
Hospital discharge physician
Referred To
Allergy specialist
Reason
Further allergy testing
Referral Processed
Date Seen
12/18/2009
Ready
Case [Training, Child] -> Client [] -> Health [Child Training]

Immunizations Page

The last three pages in the notebook, “Immunizations,” “Well Child” and “Birth History,” are not related in the same manner as the previous four notebooks. Each of these notebooks can be accessed and modified without regard to the “Diagnosed Conditions” notebook.

The “Immunizations” notebook is next. Use this notebook to document the immunizations that the client has received, when the next immunization is due and the department’s source of information for the immunization. As with the other pages in this notebook, data is entered through a grid. Functionally, all data in a grid is entered in the same manner in CWS/CMS; click the “+” in the top left corner of the grid.

Complete the dialogue box to access and complete fields on the page.

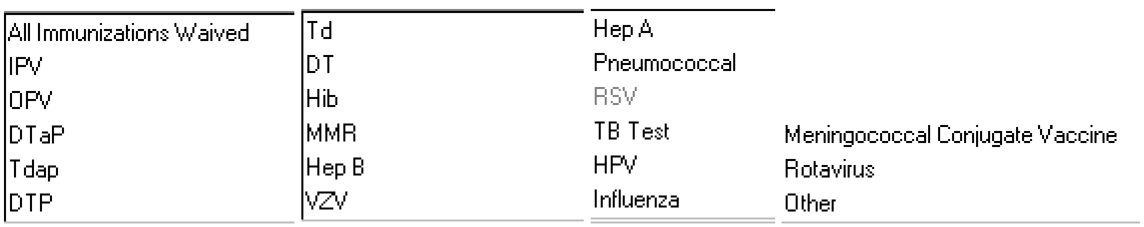


Provide the date the immunization was given, or the date immunization was waived by someone with the legal authority to do so. 

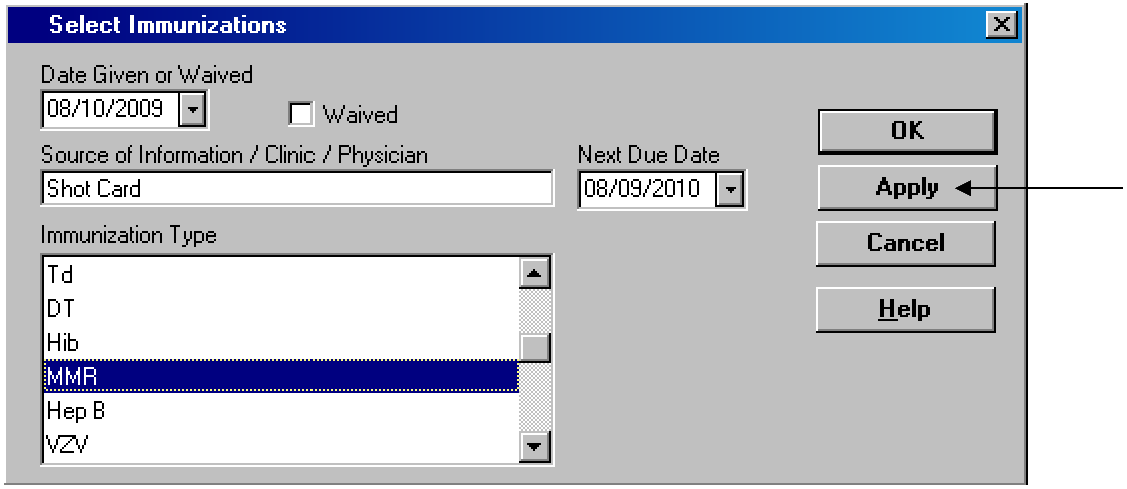
If the immunization was waived, click the “Waived” box to the right of the date.

Next, provide the source of the information. Usually this is the shot record/card. Other sources may be from the billing statement from or conversations (contacts) with the physician or SCP (foster parent, group home staff, etc.). If available, also record the date the next immunization is due.

Next, from the dropdown menu, select the type of immunization the client received.



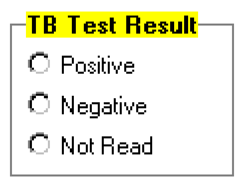
At this point, there is a change or addition to the functionality of the dialogue box. Notice the “Apply” button directly below the “OK” button on the next page.



If entering another immunization, select the "Apply" button. The dialogue box will clear, making it possible to enter the next immunization. Continue using the "Apply" button until all immunizations are entered, and then click on the "OK" button. All immunizations entered prior to hitting the "OK" button will be entered on the page.

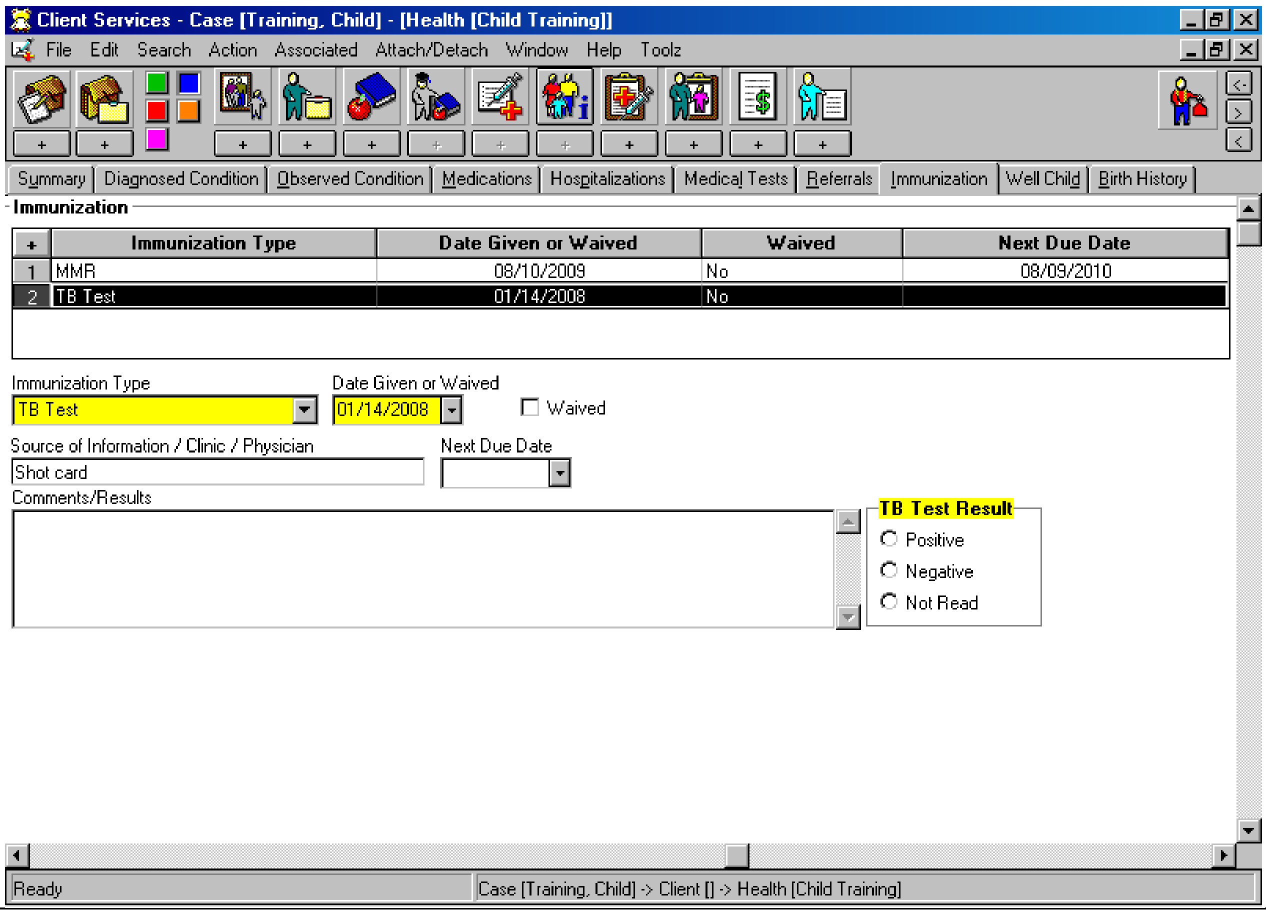
Tip: If the apply button is clicked one too many times, simply click on the "Cancel" button. All entered data will display on the page.

Unless a TB test is entered as the immunization type, the "TB Test Result" information box will be deactivated. When a TB test type is entered, the "TB Test Result" information box becomes mandatory.



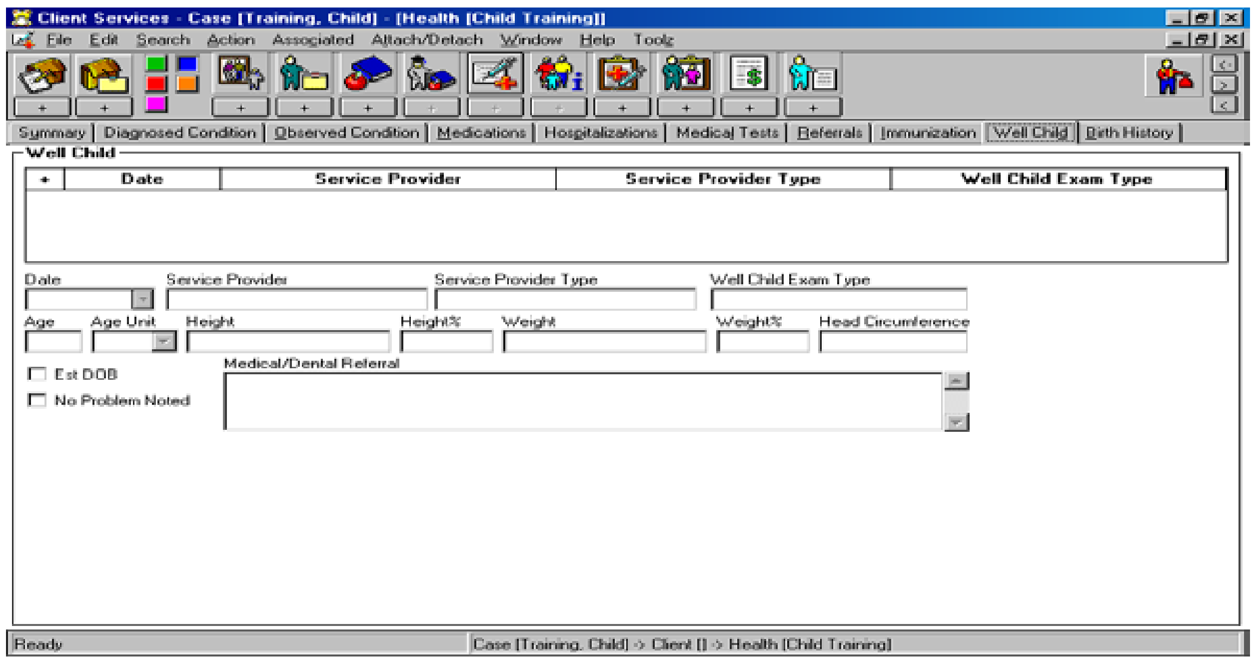
Select the appropriate answer and click in the radial button next to that answer. Use the "Comments/Results" narrative box for recording any comments about any immunization or test entered on this page. The narrative box is specific to the immunization or test on the line in the grid that is selected. Each line has its own narrative box. The narrative box will hold 254 characters.

Below is an example of a completed immunization page.

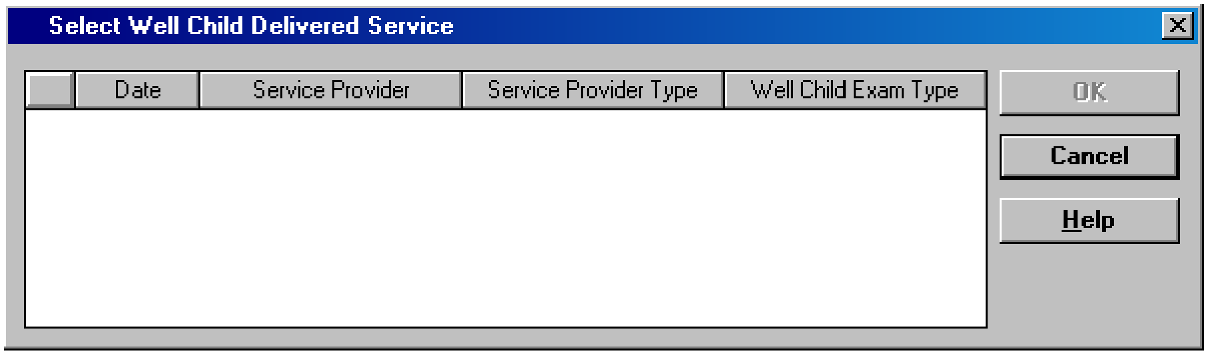


Well Child Page

By clicking on "Well Child," a blank form opens, as shown below.

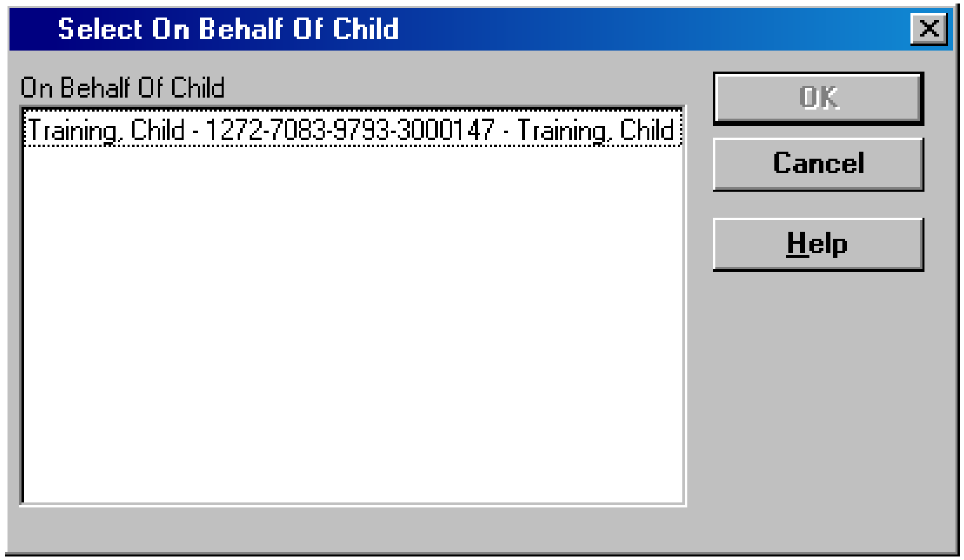


Click on the "+" in the top left corner of the grid. This will result in the following dialogue box.



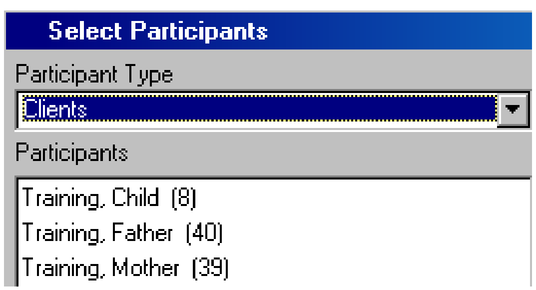
This dialogue box appears to be the same as the other dialogue boxes in the "Medications," "Hospitalizations," "Medical Tests" and "Referrals" pages. However, this one is blank, whereas the previous dialogue boxes all created choices based on "Diagnosed Conditions." A closer look at the title bar of this dialogue box shows that it is looking for "Well Child Delivered Services." "Delivered Services" is the second page of the "Contact" notebook.

To document that this child received a well-child exam, first document that there was a contact and that a well-child service was delivered to this client. To do that, go to the "Service Management"  section and create a "New" contact by clicking on the "+" under the image of the rolodex. This will result in a new dialogue box for selecting the contact who is acting on behalf of the client/child. Note that this dialogue box is not asking who the contact was, but rather who received a benefit from the contact. The only choices available are the child clients and child siblings. In this case, select the child and then click, "OK."

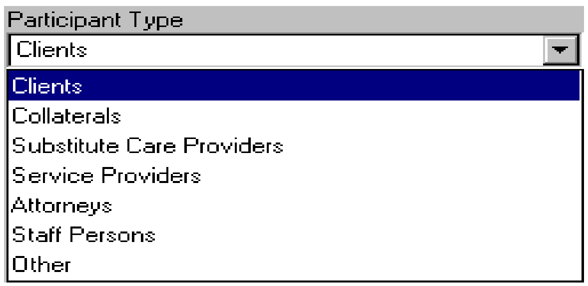


This will cause the application to open a new page. Use the new page to document the contact that provided the "CHDP" information. In this instance, it was a telephone call with Dr. John Schmidt.

When first clicking the "+" to enter who participated in the contact, the following dialogue box appears.

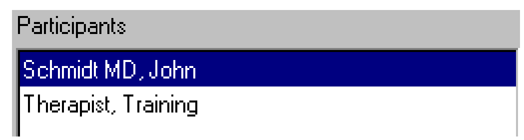


This contact was not made with the child or either parent. It was made with Dr. John Schmidt. The participant should be Dr. John Schmidt. To be able to document Dr. Schmidt as the participant, click the down arrow to the right of "Clients." This will result in the following dropdown menu.



If Dr. Schmidt is entered as a "Service Provider," select the "Service Providers" option. If not, select "Other." In this example, Dr. Schmidt is entered as a service provider; therefore, "Service Providers" will be selected.

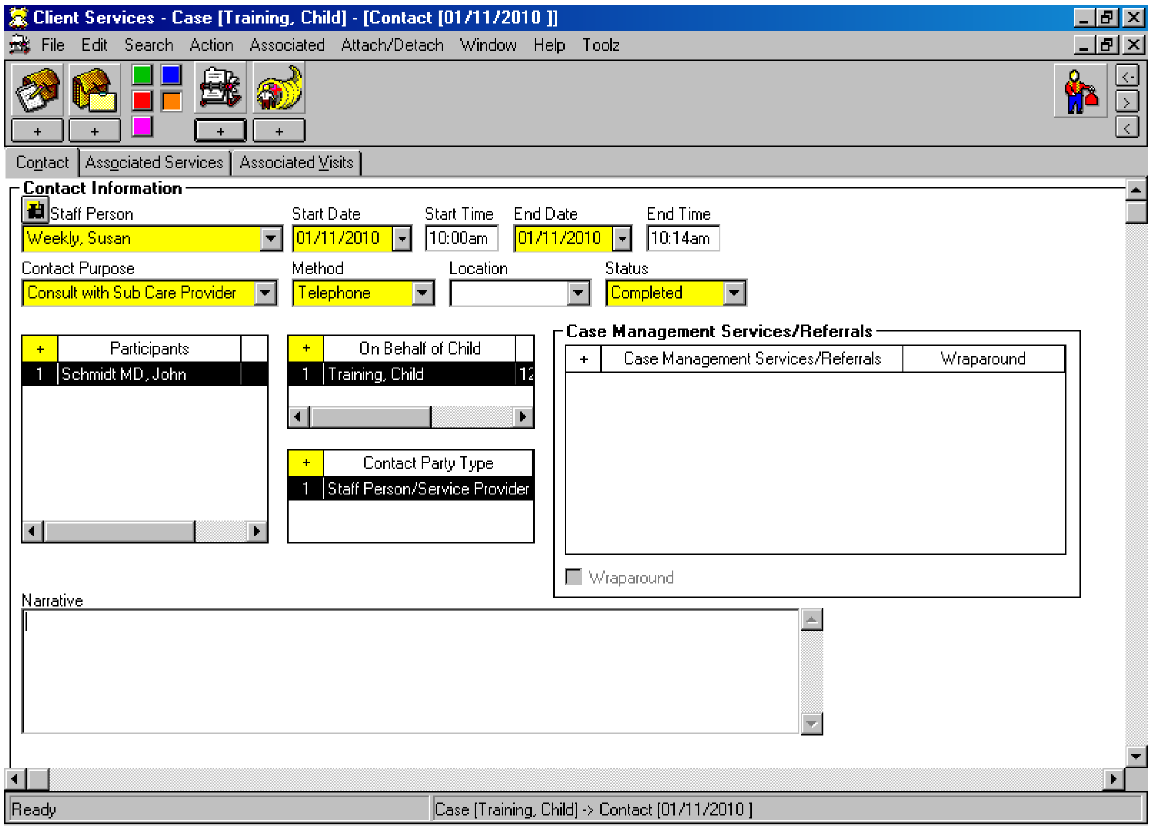
This will result in a list of the service providers recorded in this case.



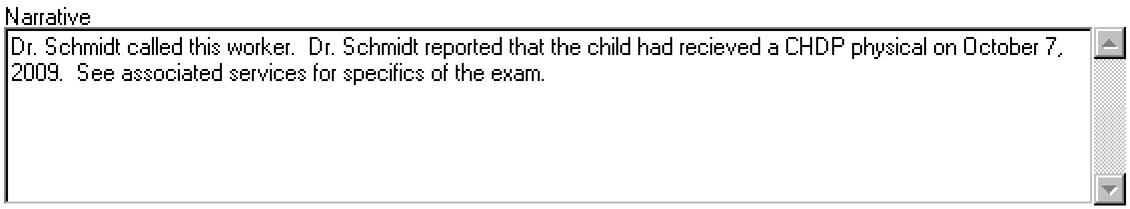
Dr. Schmidt's selection is shown in the highlighted area. If he was not the correct service provider, you would click on Dr. Schmidt and then click the "OK" button to the right. If the service provider is not listed, click on "Other," which will produce a selection list with only one choice: "Other." Click the "Other" in the list and then, "OK."

The contact notebook page with the data fields that have been completed to this point are demonstrated on the following page.

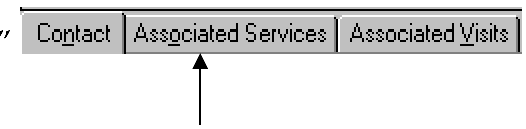
Contact Notebook



Complete the "Narrative" box. See the example below.

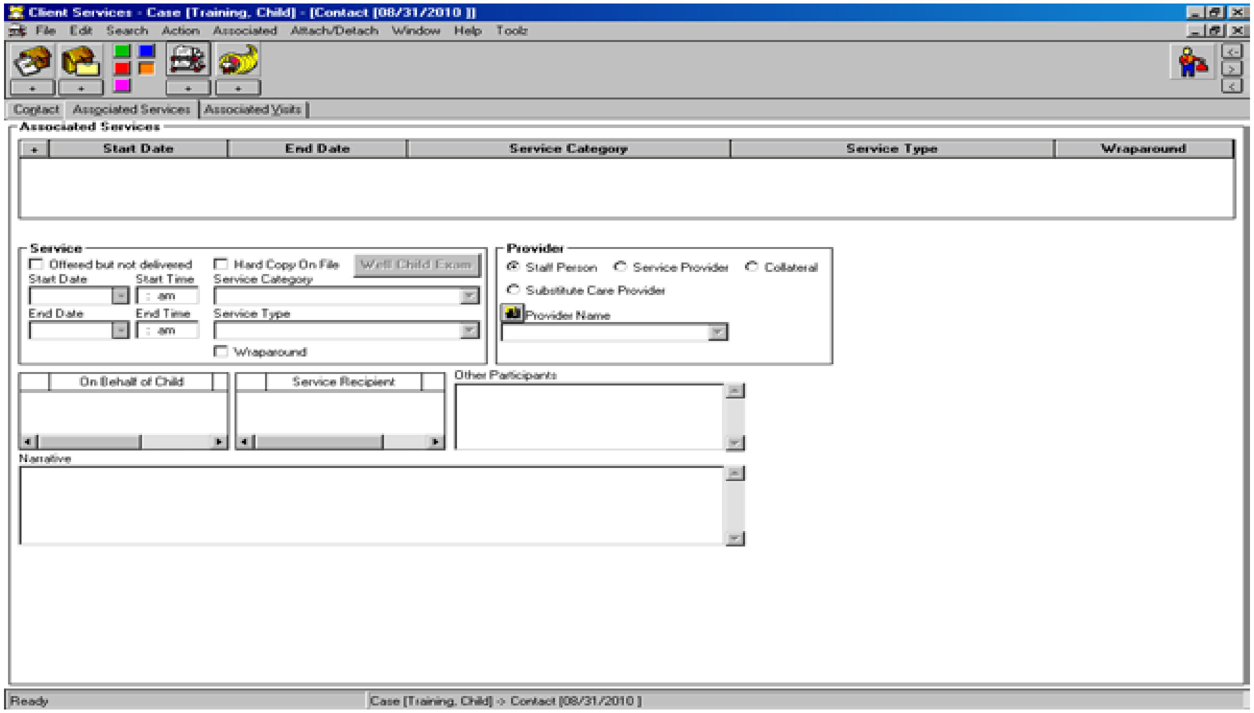


Next, go to the second page on the contact notebook, "Associated Services."



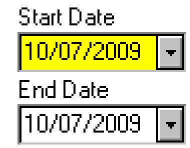
Associated Services Page

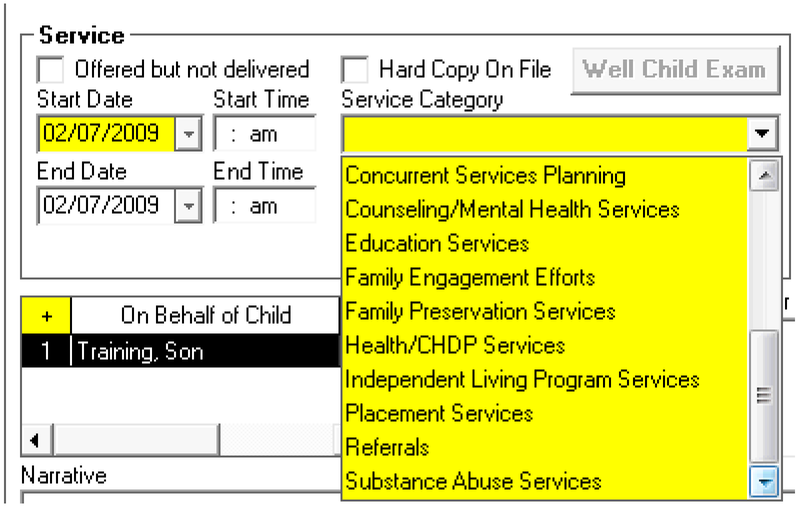
Click on the "+" in the top left of the grid.



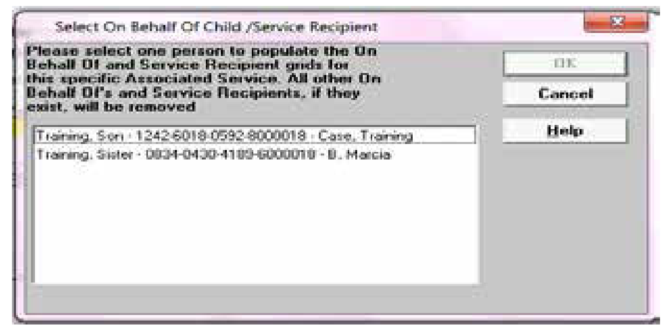
Complete the mandatory fields. Starting with the date. 

In this example, the date was October 7, 2009 (refer to the contact narrative). Note that when the user enters a "Start Date," the application automatically generates an "End Date" that will be the same as the start date. This can be changed if necessary.

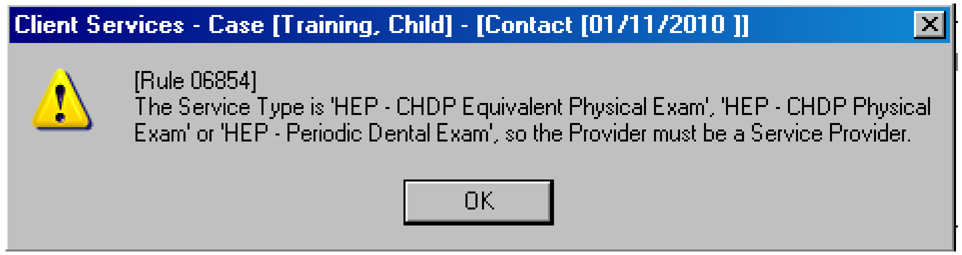




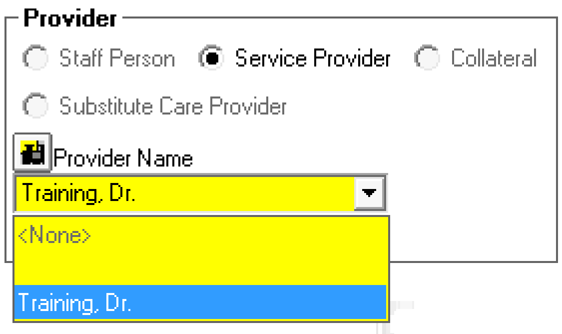
Next, select a "Service Category" from the dropdown list. In this example, the category was "Health/CHDP Service." After selecting a category, select a "Service Type." In this example, the type is "HEP – CHDP Physical Exam." Regardless of how many participants have been selected for this service, the user will always be asked to select a specific child client for the set of choices at this time.



Select only one child from the list and then click on the "OK" button. The following message displays.

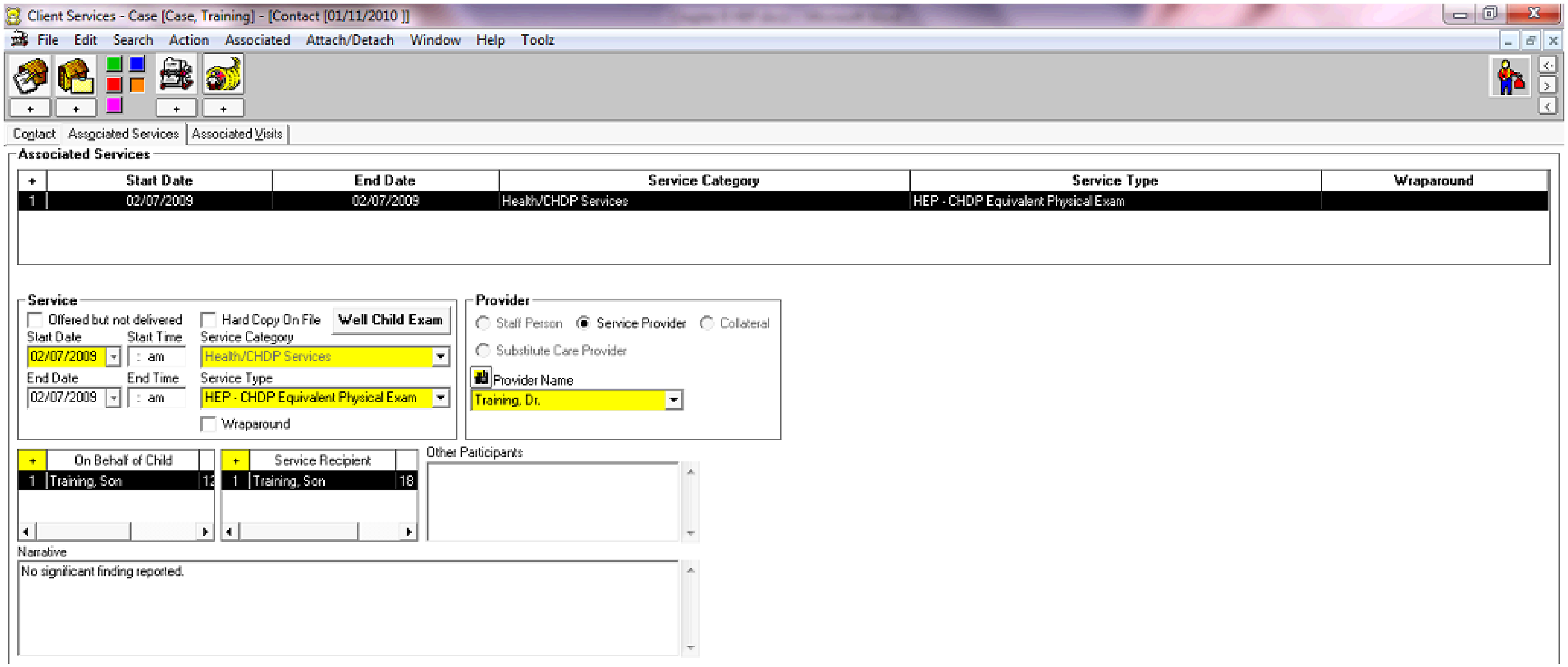


Click the “OK” button. Next, the application will ask that the “Servcice Provider” who provided the service be selected. Any “Service Providers” attached to this client will be in the dropdown list. If no service providers are shown when the down arrow is clicked, then create a new provider before saving the work. In the example, Dr. Training is already a service provider; therefore, click the down arrow and select Dr. Training by clicking on the doctor’s name.

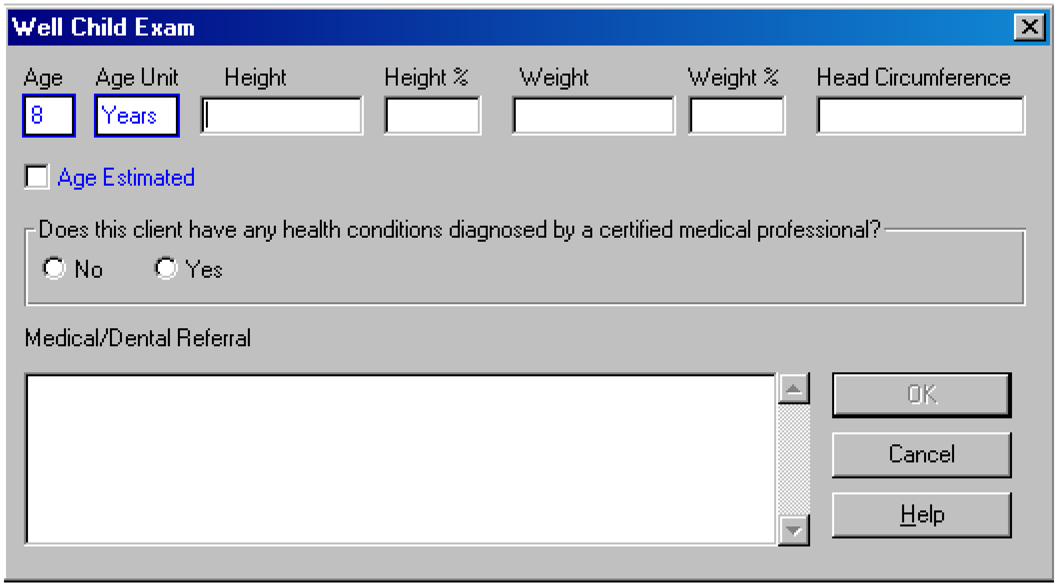


Next, complete the “Narrative” box with specifics about the exam.

The following page shows a completed “Associated Services” page.

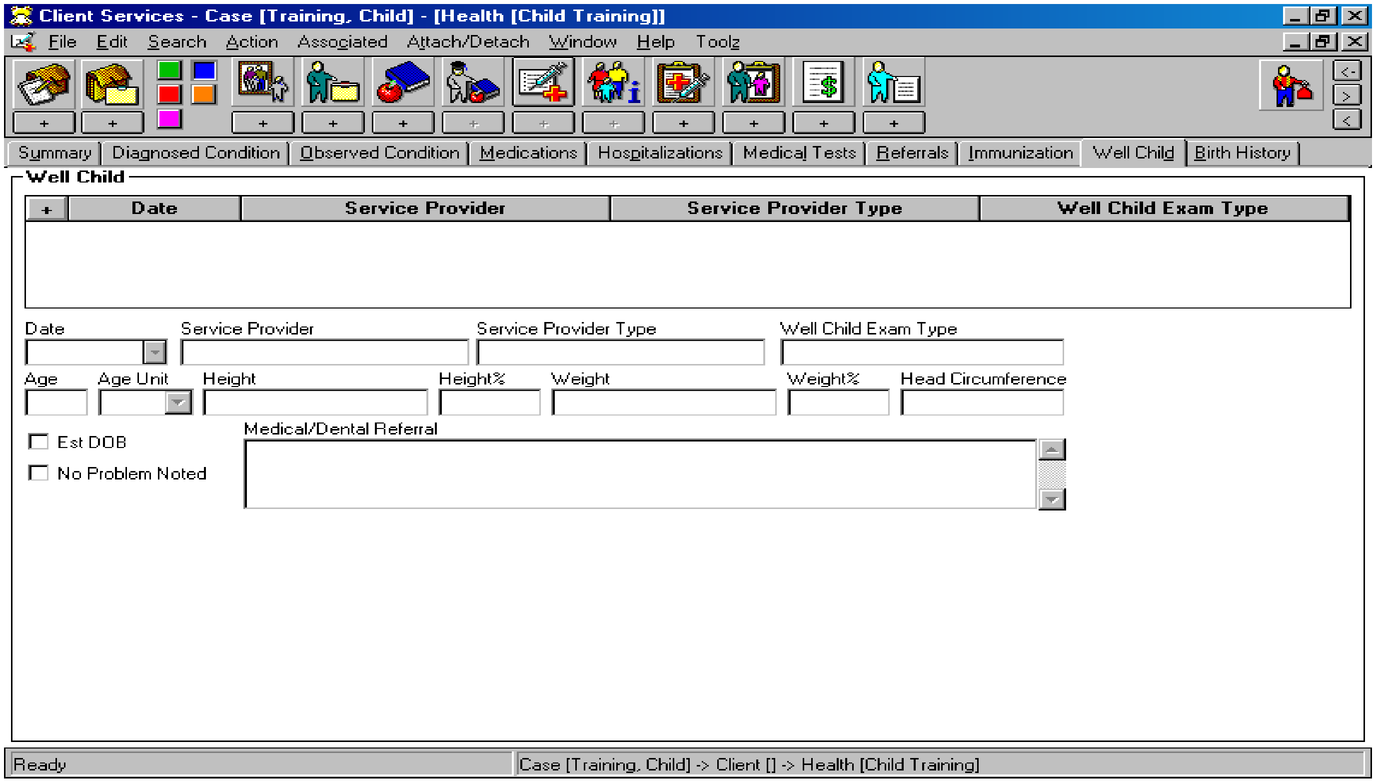


The most usual next step is to click on the "Well Child Exam" button.  The following "Well Child Exam" dialogue box then appears.

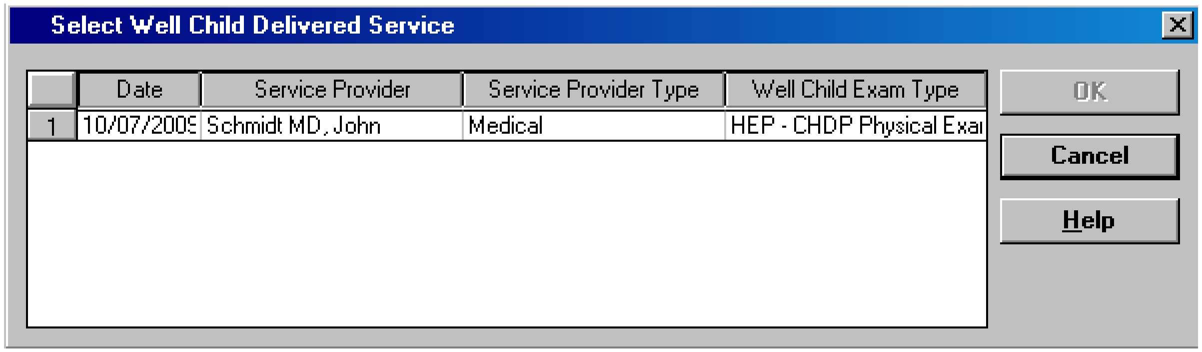


Provide all available information. Either the "Yes" or "No" radial button must be selected to enable the "OK" button. All other information is optional. After selecting yes or no, click on the "OK" button. This will enter the data into the health notebook.

"Save to Database" is an option at this time. To reopen the case, go to the "Well Child" page in the child client's "Health" notebook. If the exam has not been documented here, the page will look like the example shown on the next page.

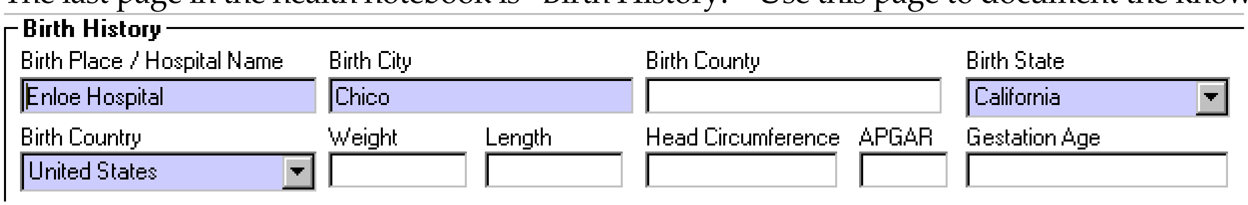

Client Services - Case [Training, Child] - [Health [Child Training]]
File Edit Search Action Associated Attach/Detach Window Help Tools
Summary | Diagnosed Condition | Observed Condition | Medications | Hospitalizations | Medical Tests | Referrals | Immunization | Well Child | Birth History
Well Child
Date
Service Provider
Service Provider Type
Well Child Exam Type
Date
Service Provider
Service Provider Type
Well Child Exam Type
Age
Age Unit
Height
Height%
Weight
Weight%
Head Circumference
Est DOB
No Problem Noted
Medical/Dental Referral
Ready
Case [Training, Child] -> Client [] -> Health [Child Training]

Click the "+" in the top left of the grid. After entering the delivered service in the contact notebook, the dialogue box will now show that contact as a delivered service, and it may be selected from the dialogue box by clicking on it. Click the "OK" next.

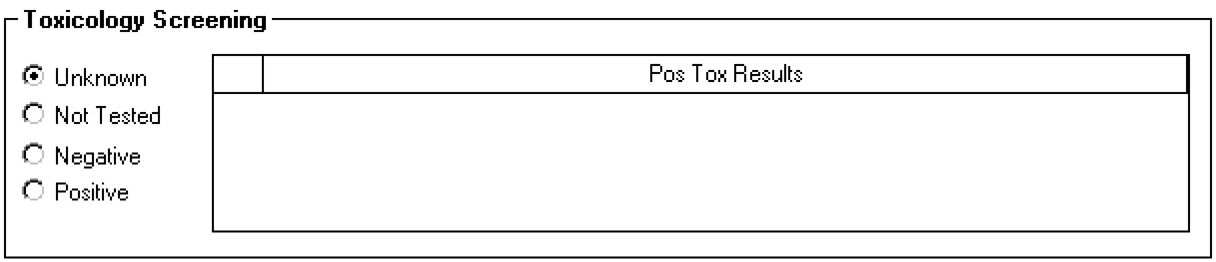


This completes entering data to the "Well Child" page.

The last page in the health notebook is "Birth History." Use this page to document the known facts relating to the child's birth.

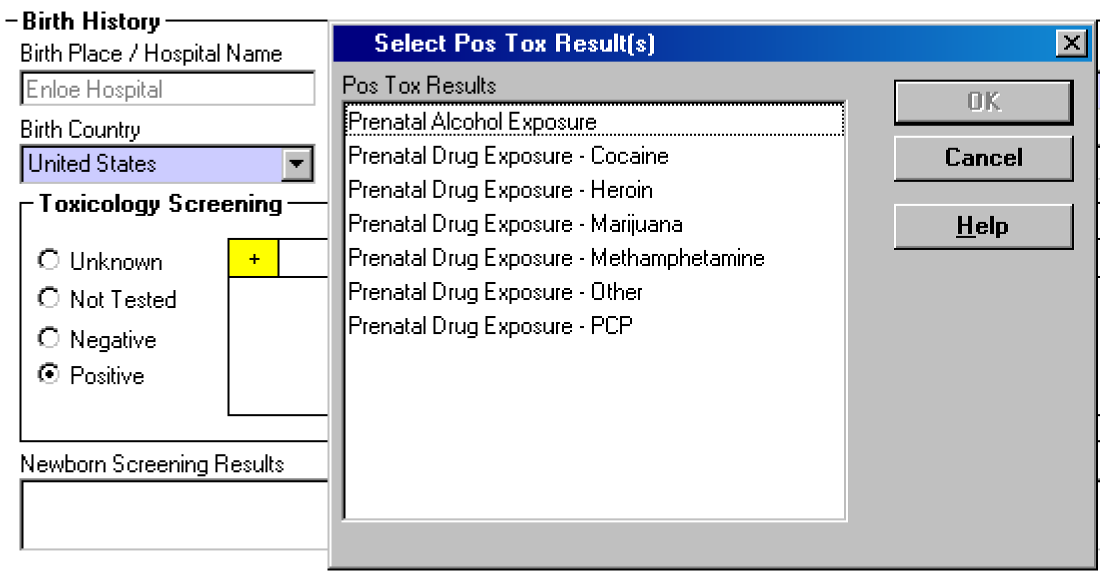


The periwinkle fields will already be populated if they were completed in the "Demographics" page in the client notebook. On the demographics page, there is a "Birth Country" field. There is also a "Birth County" field on this page, but do not confuse them. When known, type in the name of the county and the other five fields above.

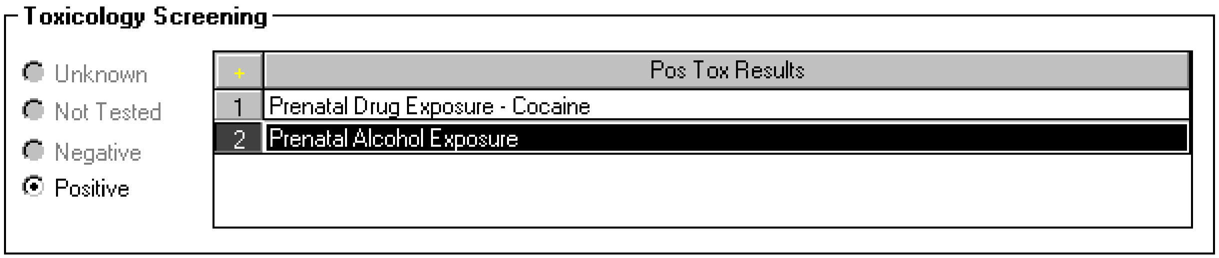


At first look, the "Toxicology Screening" information box may appear to be inoperative. This is because until the child tests "Positive," there is nothing to do to this document. Only when the "Positive" radial button is selected can results be entered, and then the results become mandatory fields.

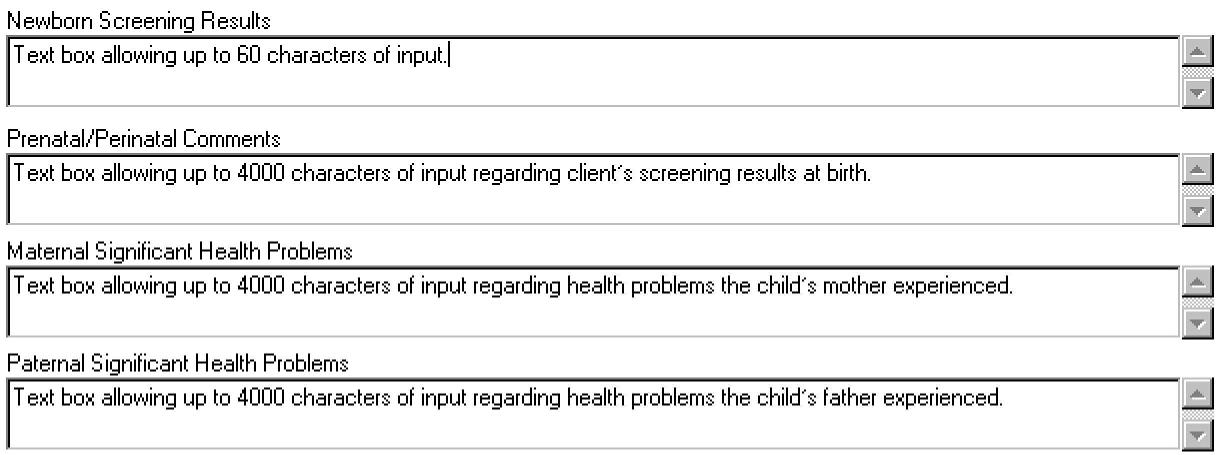
Clicking the "+" will result in the selections on the next page.



The results are a multi-select option. Select one, all or any combination that is correct. Then click the "OK" button.



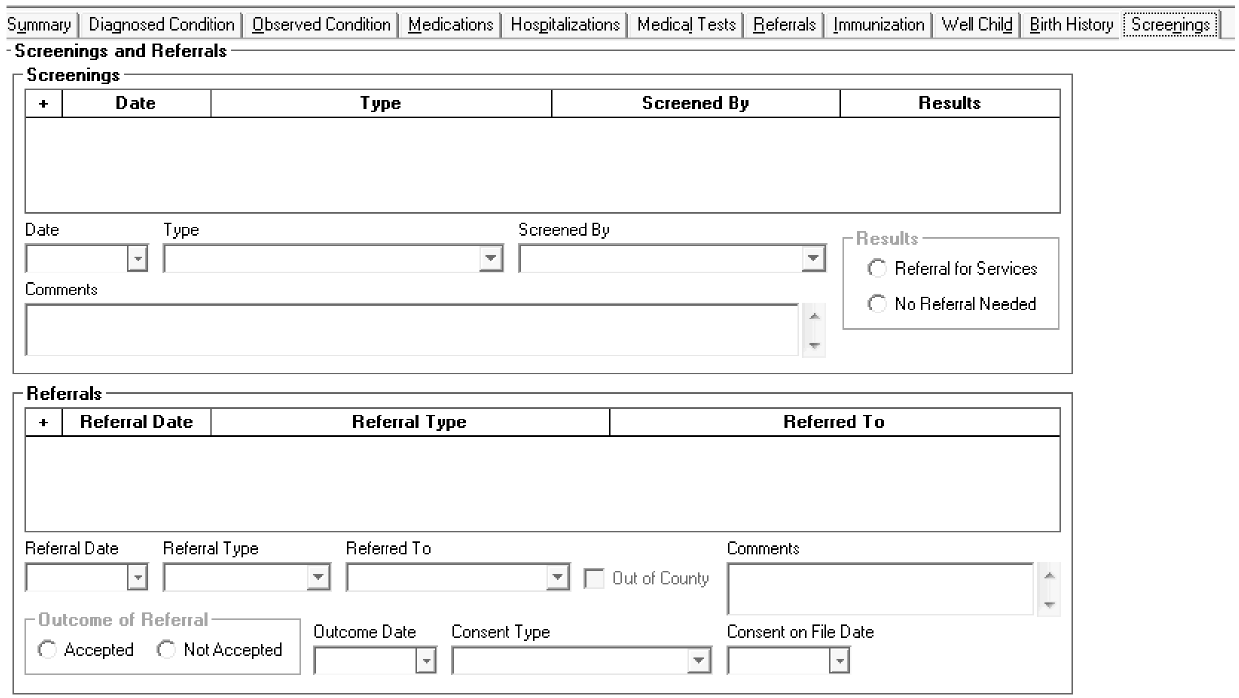
Complete the following four narrative boxes as shown.



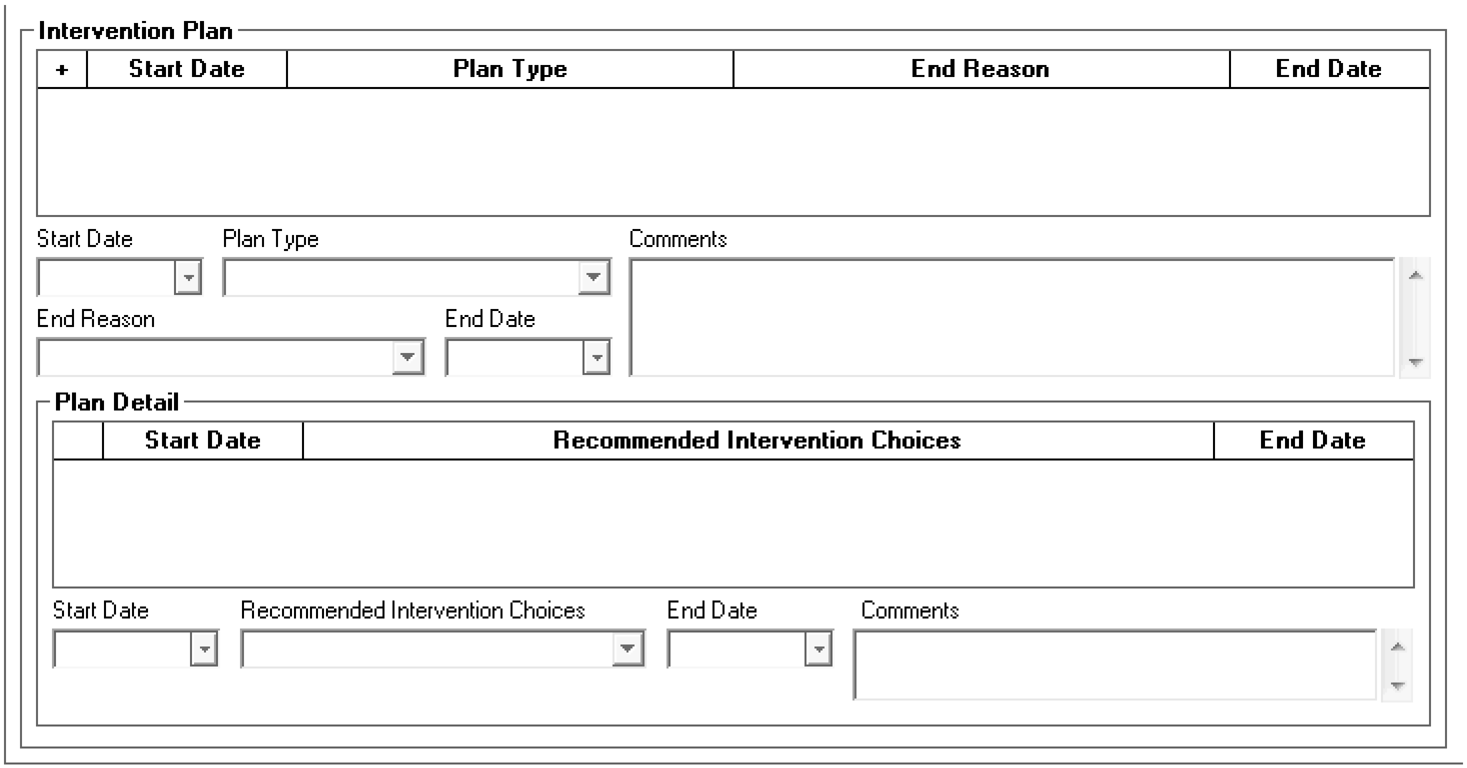
This completes initial recording of the child health information. The information will require updating as new information becomes available.

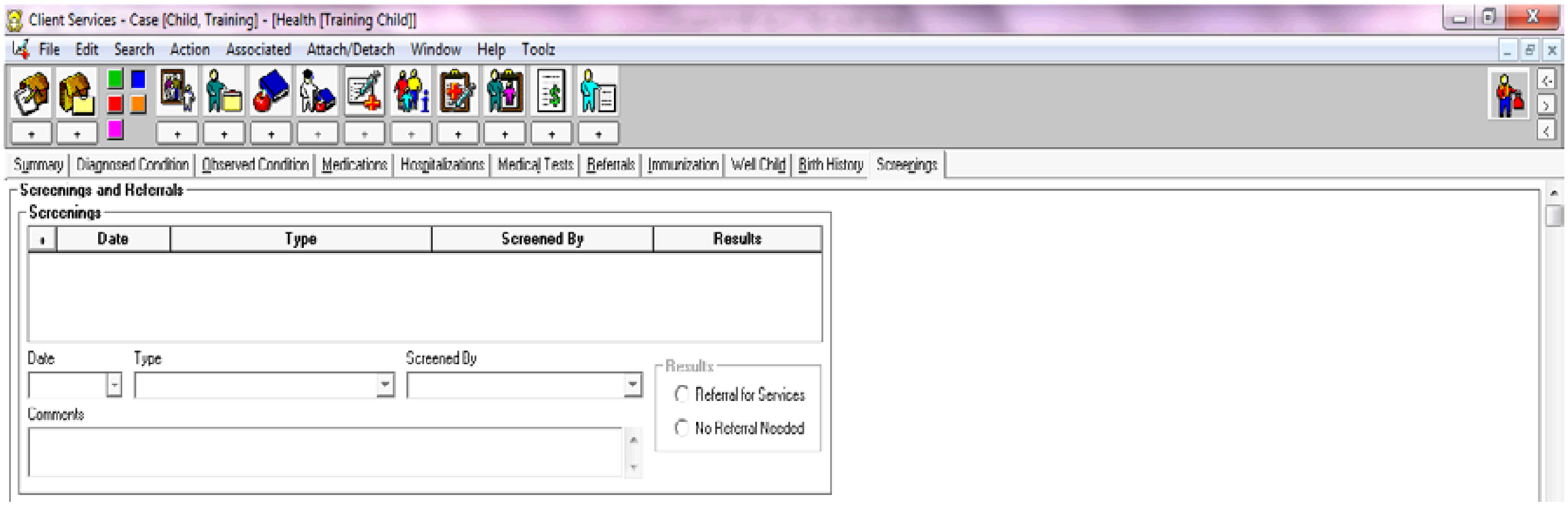
Screenings Page

The screenings page documents developmental and mental health screenings. Screenings prior to agency involvement and current screenings may be documented. The page also documents treatment plans and specific details for each treatment. Below is the first half of the page documenting screenings and referrals, two areas which are independent of each other.

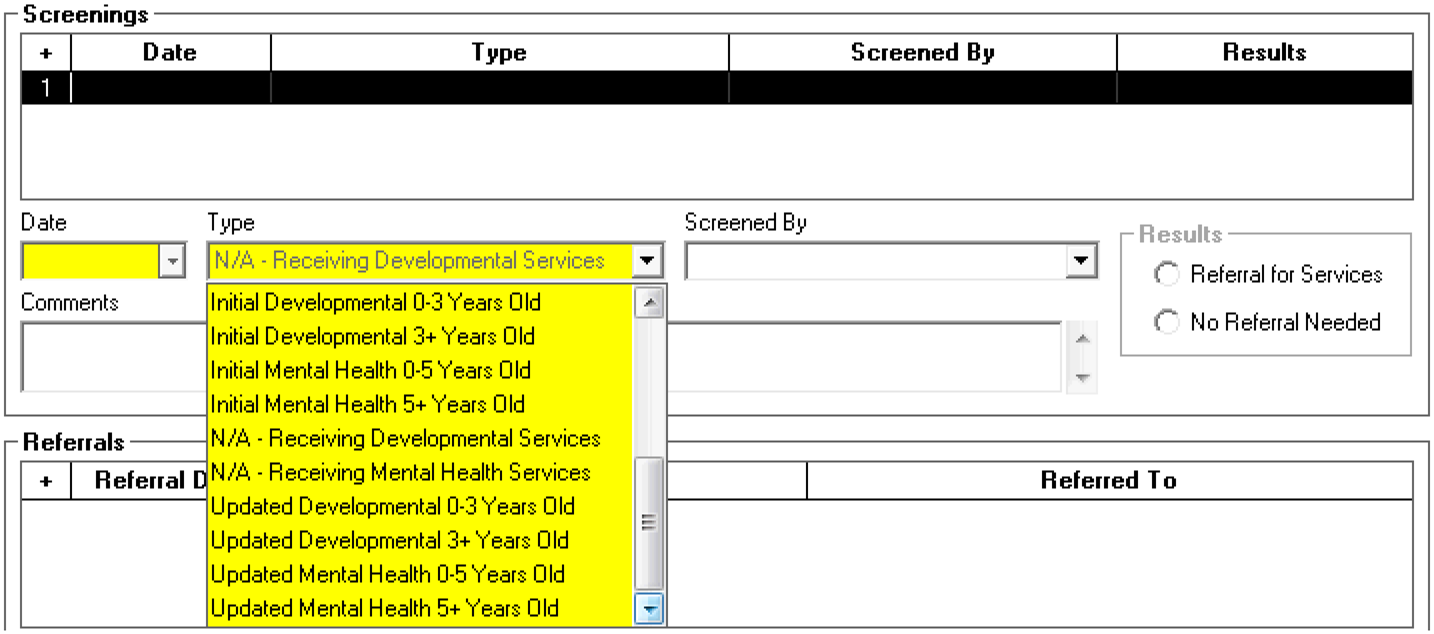


The bottom half of the page is shown below. Use these information boxes to document intervention plans and the details of each plan. These two information boxes are linked. There must be an intervention plan to enter plan detail, and the plan detail is specific to an individual plan.





To start documenting the required screenings, click on the "+" in the top left corner of the grid in the "Screenings" information box. This will result in two mandatory fields: the "Date" field and the "Type" field.

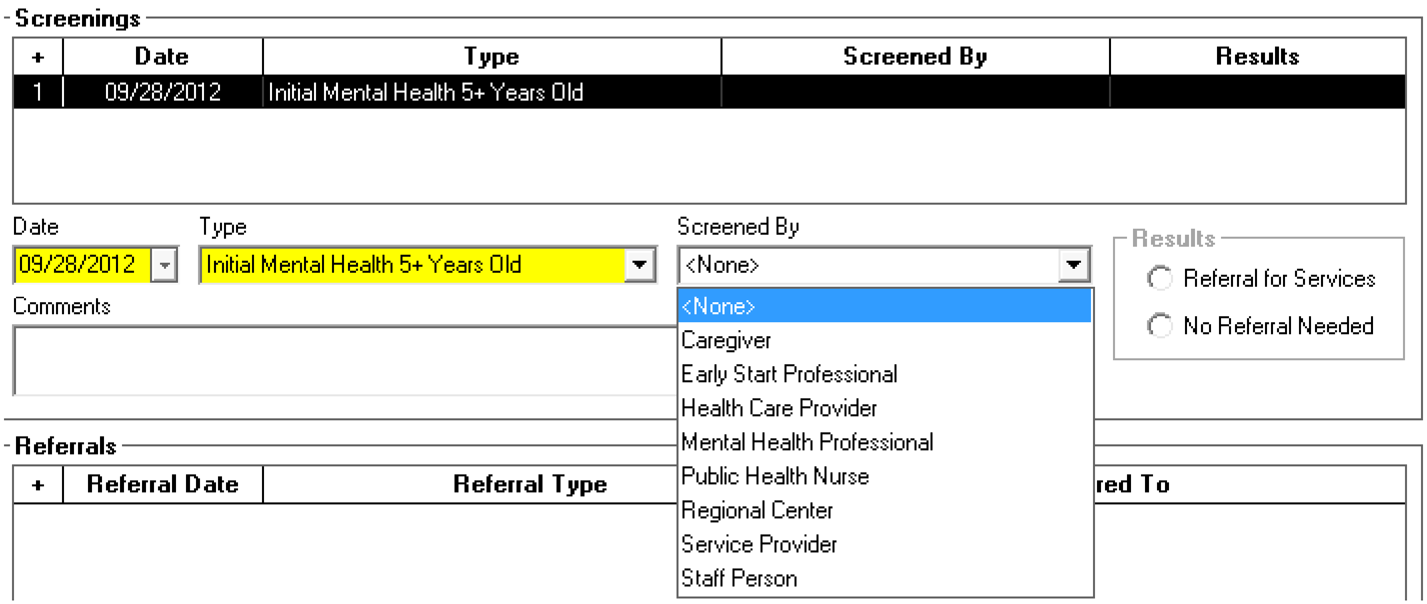


Enter the date of the screening to be documented.

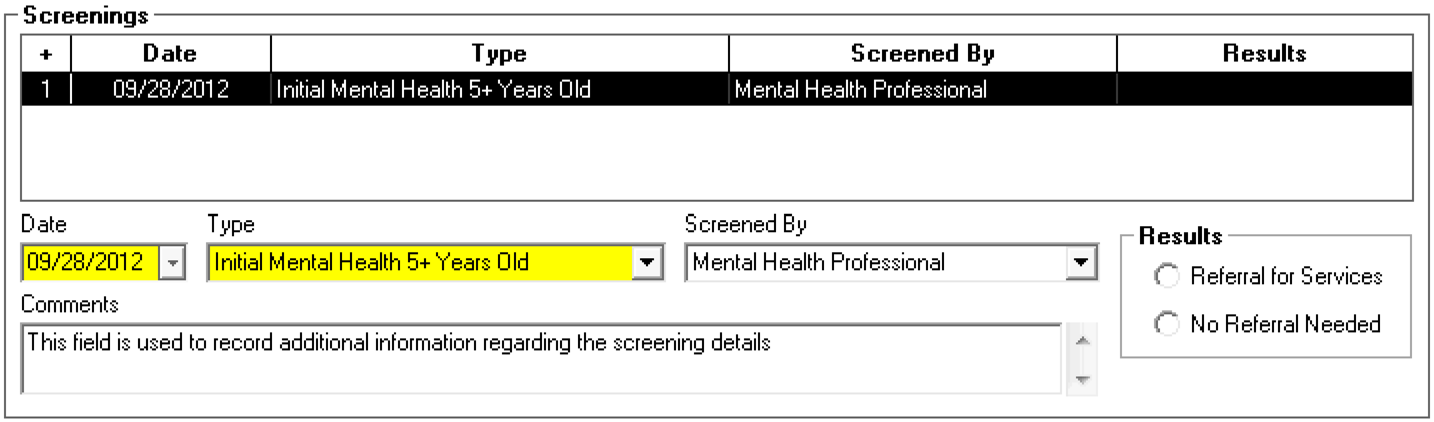
Next, from the list of 10 options select the best description of the screening.

The next field to complete is the “Screened By” field.

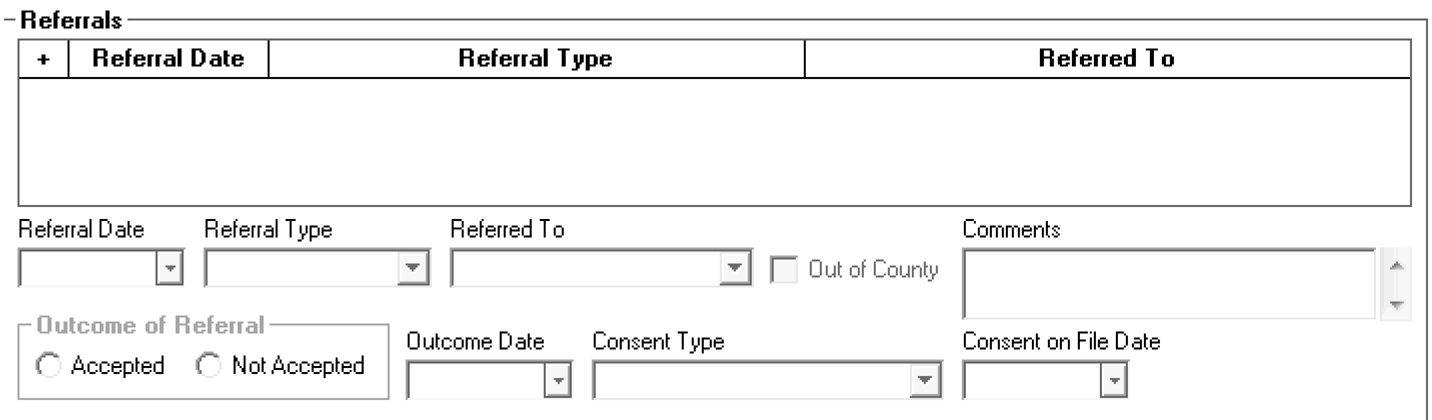
Select the party who completed the screening by clicking on the down arrow and then selecting from the provided list.



Complete the "Screenings" information box by selecting one of the options in the "Results" information box. Additional information can be entered in the "Comments" narrative box at the bottom of the "Screenings" information box if necessary.

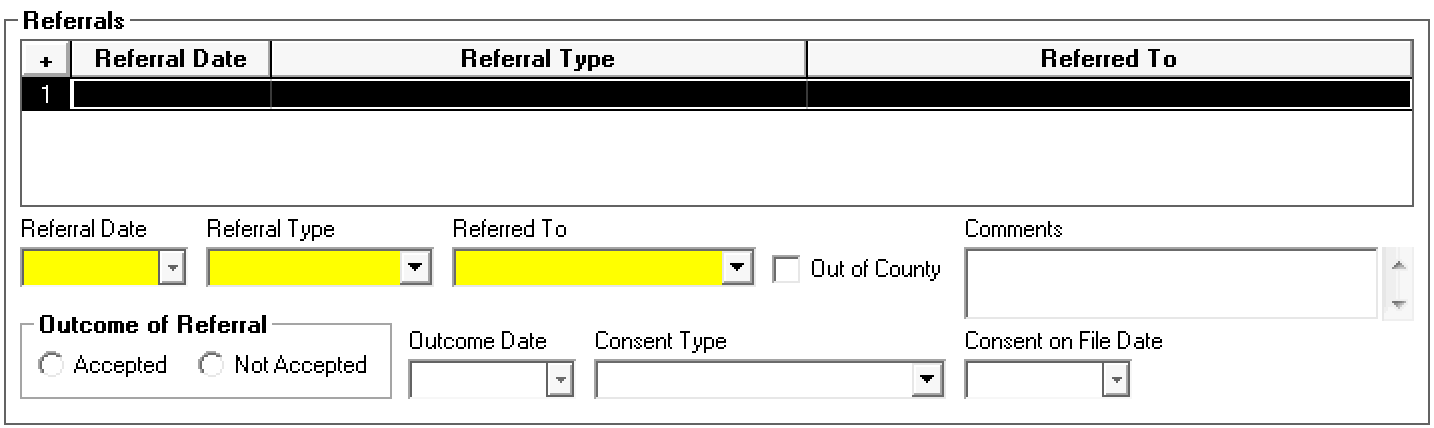


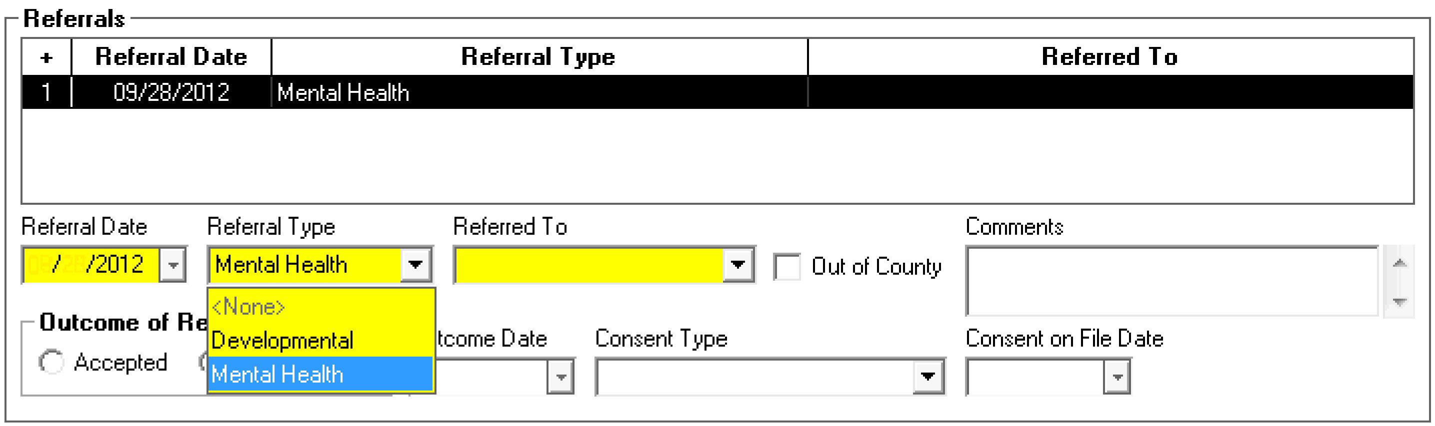
Next, the "Referrals" Information box will be demonstrated.



Use the "Referrals" information box to document any referrals that were made as a result of any of the screenings documented in the "Screenings" information box above the "Referrals" information box. As with all other grid fields in CWS/CMS, start by clicking on the "+" in the top left corner.

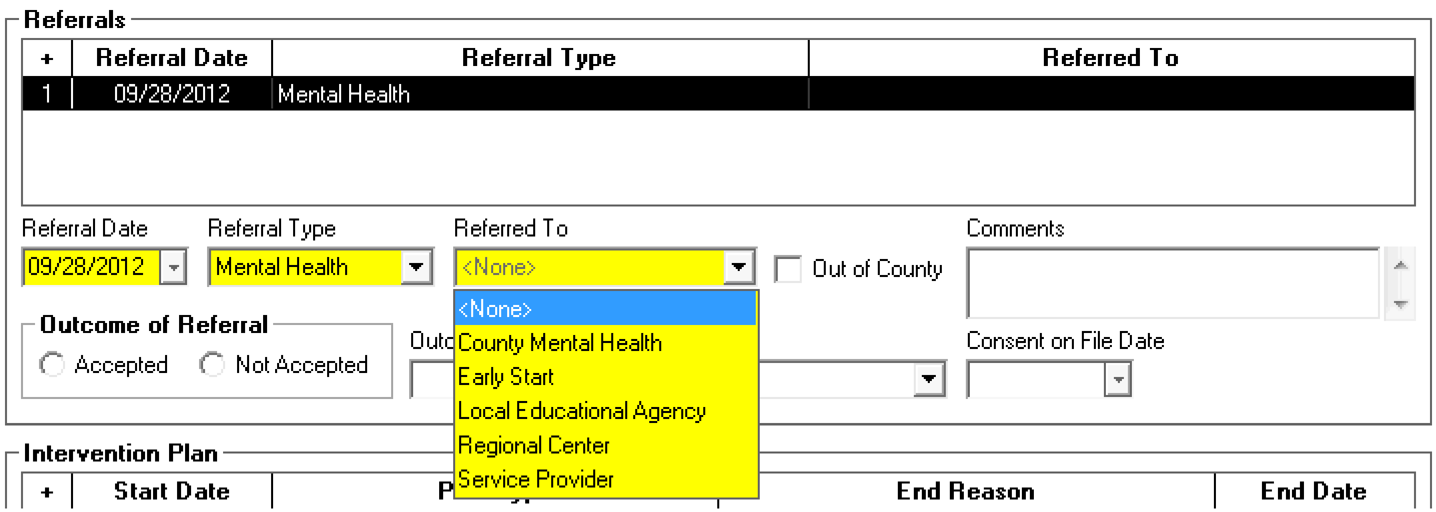
This will result in three fields becoming mandatory, as shown below.





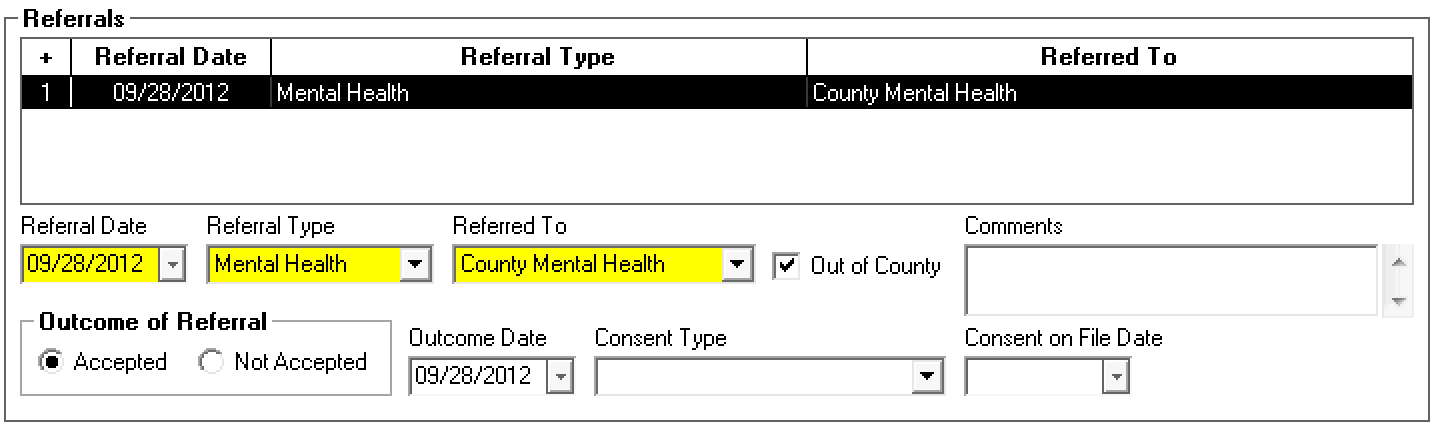
Complete the referral date and then select the type of referral from the list in the dropdown menu under "Referral Type."

From the "Referred To" dropdown menu, select the appropriate provider.

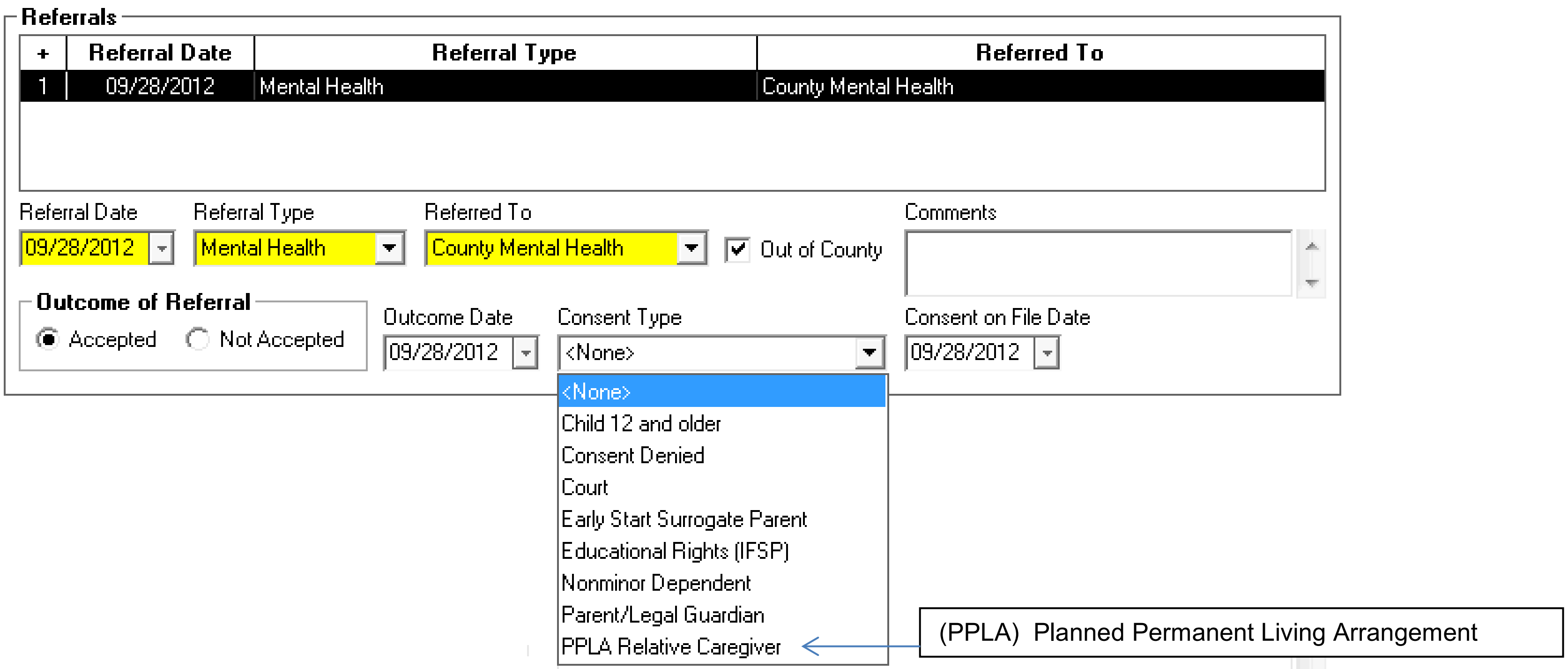


Select the "Out of County" check box if the agency in the "Referred To" field is out of county. Use the "Comments" narrative box to add any additional information regarding this referral.

Next, record if the agency the referral was sent to accepted or rejected the referral by clicking the appropriate radial button in the "Outcome of Referral" information box, then enter the date of that action in the "Outcome Date" field.

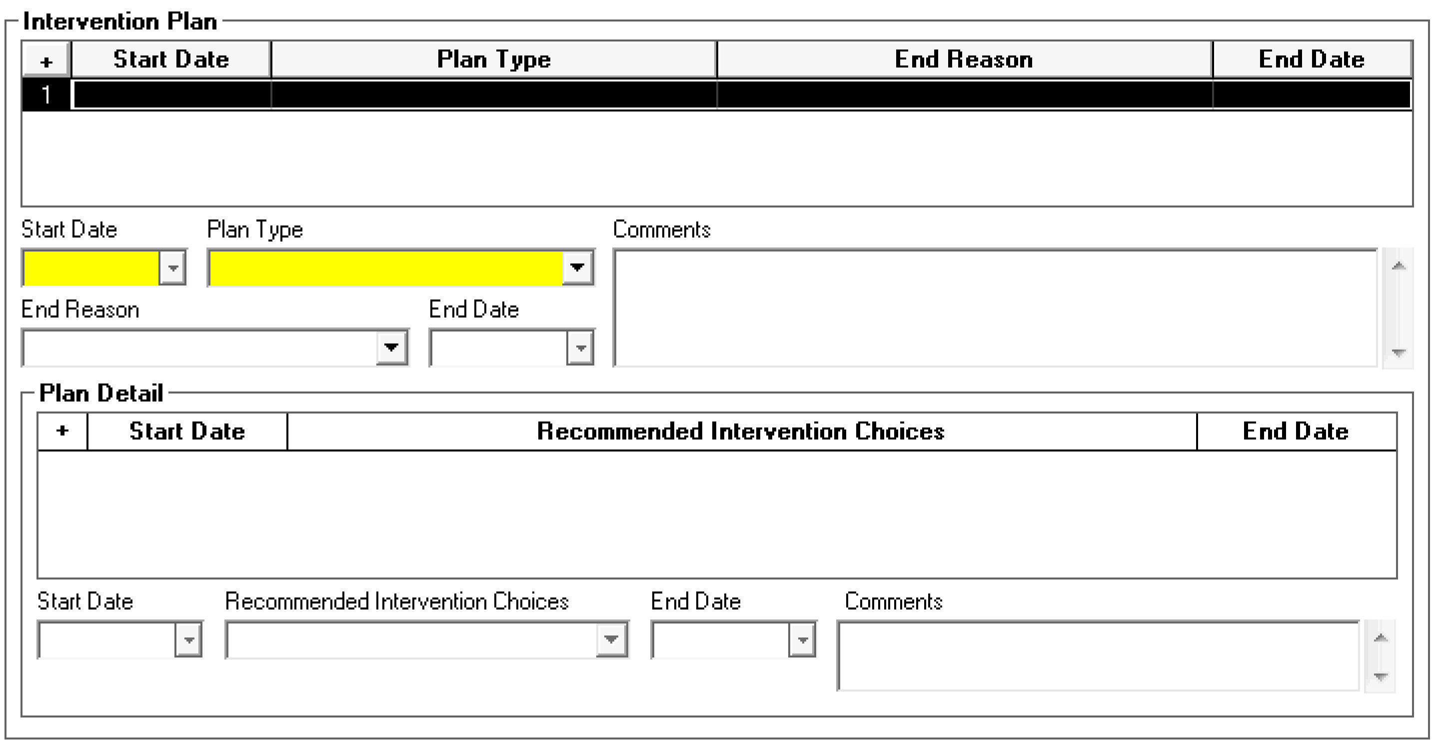


The last two fields to complete in the "Referrals" information box are "Consent Type" and "Consent on File Date." Use these fields to record what type of consent was given for the referral to be made and when that consent was received. First click on the down arrow, and then select the type of consent from the resulting selection list. Enter the date of the consent for the referral in the last data field in this information box.

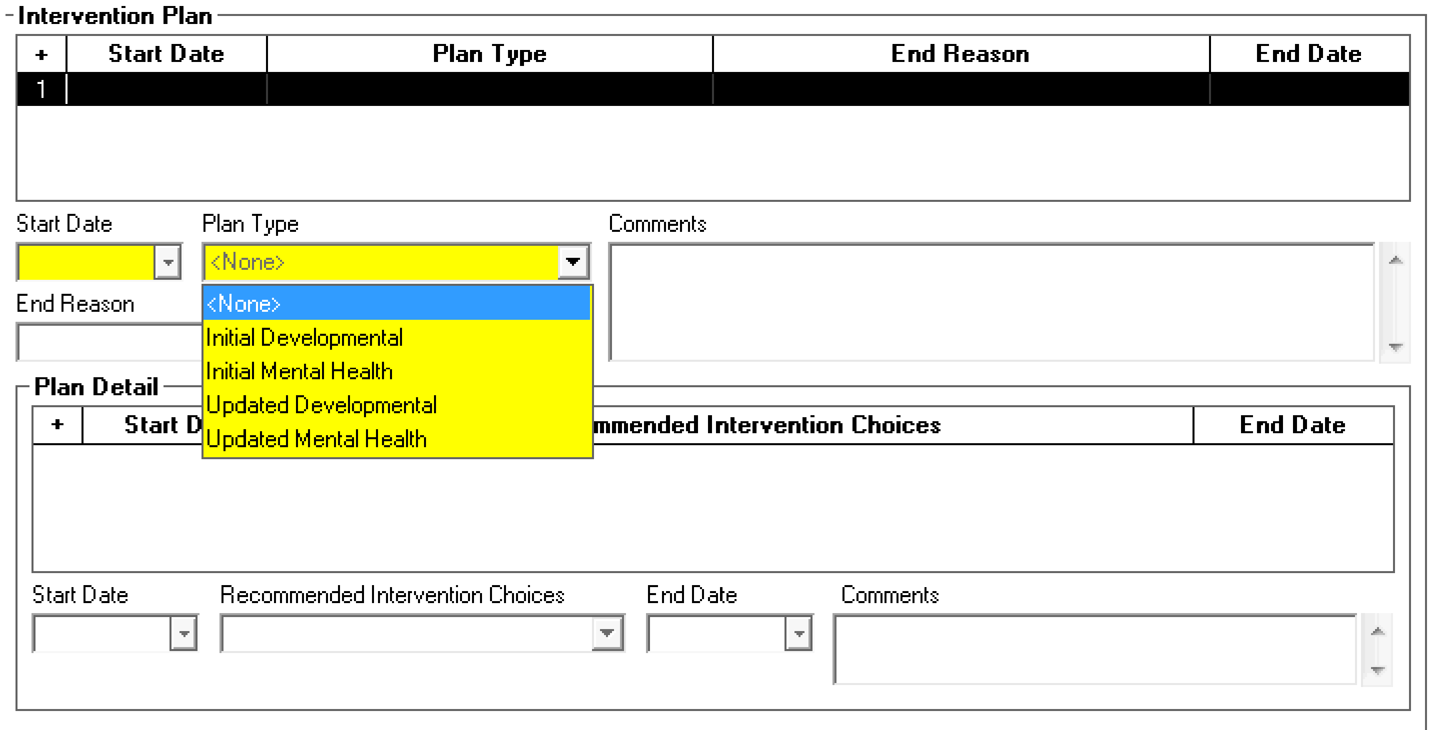


The next, or third, information box, or frame, on the page is the "Intervention Plan" information box. Use this information box to document intervention plans that result from the screenings and referrals for the child. Intervention plans listed in this information box are "linked" to the "Plan Details" in the last box on the page. Each intervention plan may have details that are specific to that plan.

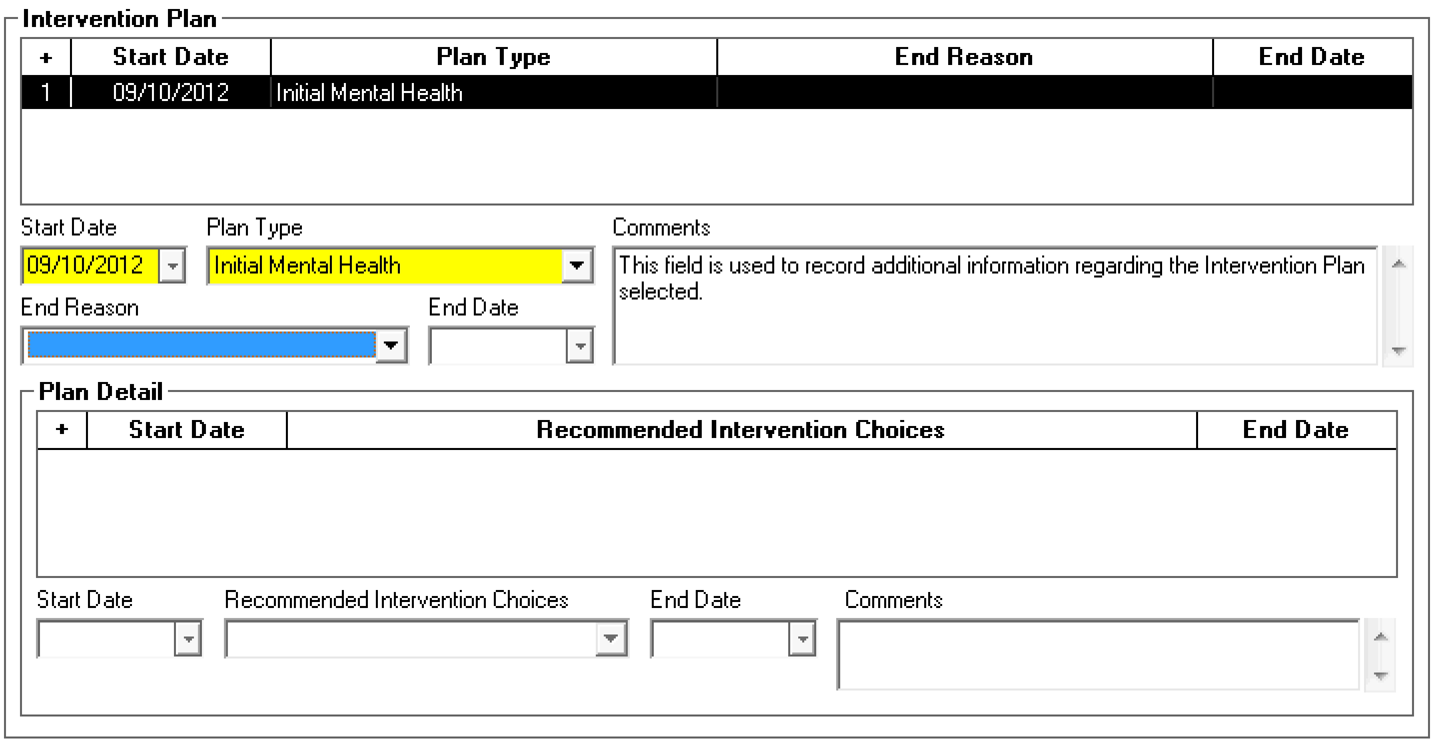
To start recording intervention plans, as always for a grid field, click on the plus sign (+) in the top left corner of the grid in the field. There will be two yellow (Mandatory) fields to complete. See the example below.



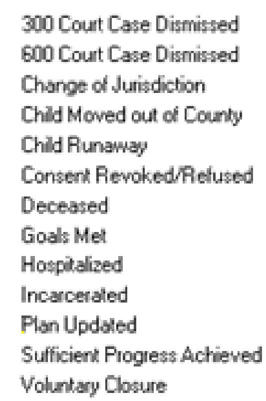
Enter the start date in the “Start Date” field. Then, click the down arrow in the “Plan Type” field. Select the plan type from the resulting list.



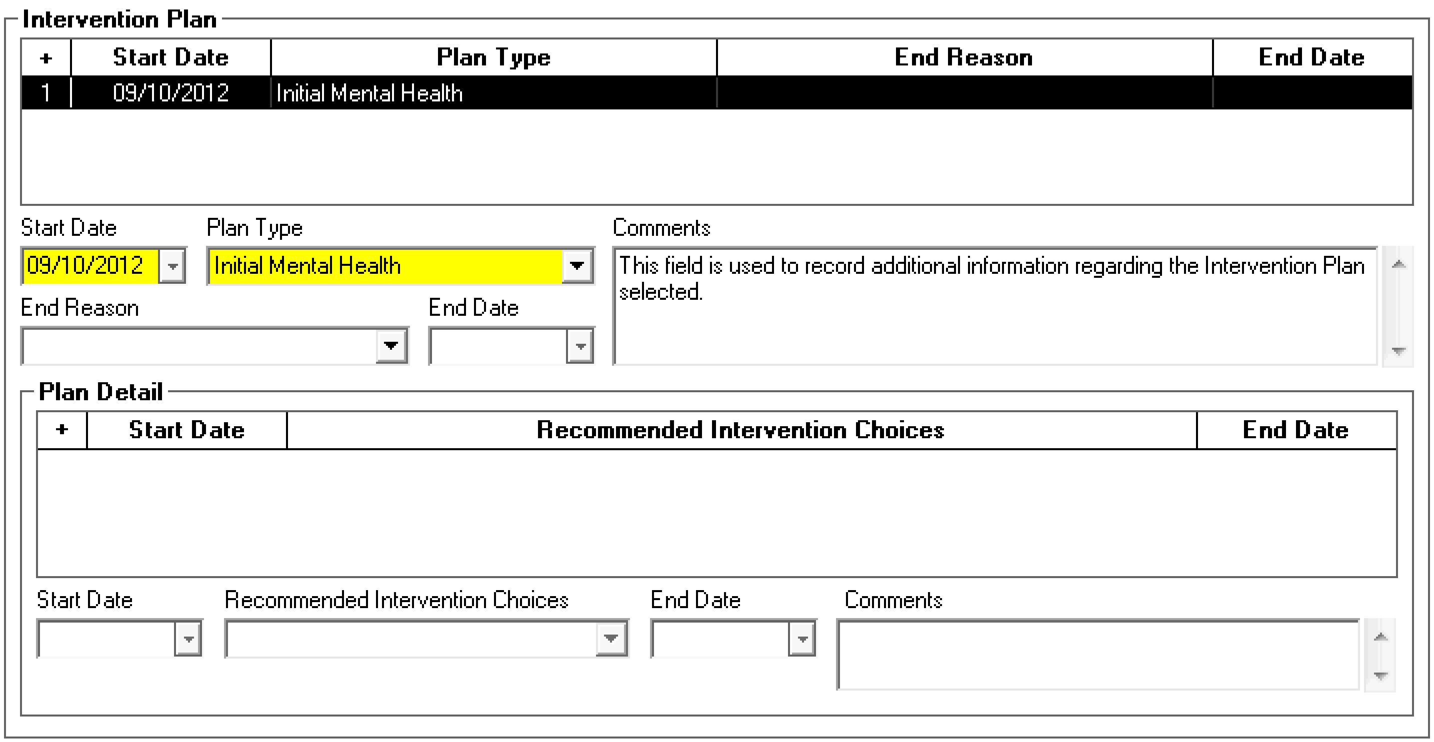
Below is a completed "Intervention Plan" information box for an open plan. The plan is ended is when an "End Reason" and "End Date" are entered.



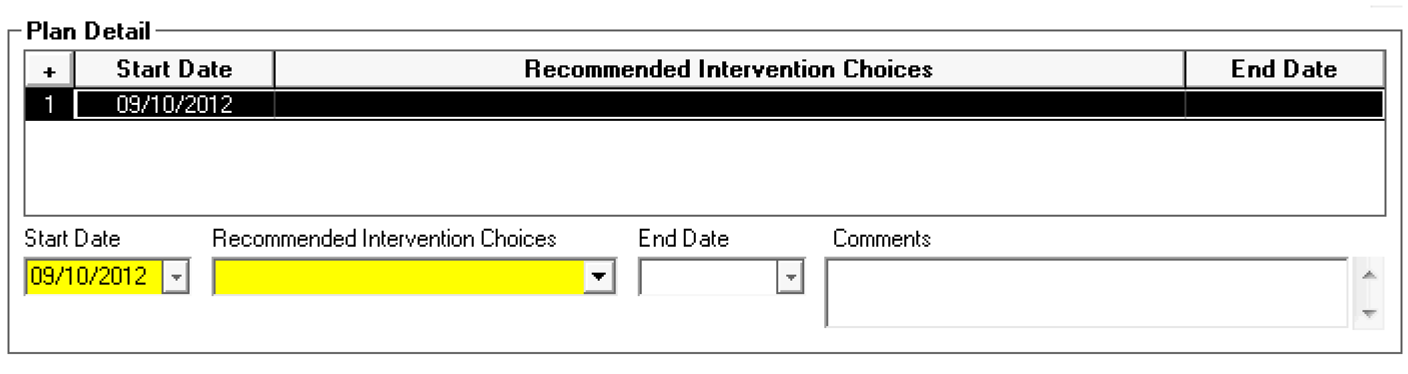
When ending an intervention plan, click on the down arrow and select from the following list of reasons:



The "Intervention Plan" details may be entered in the "Plan Detail" information box. The information will be associated to a specific intervention plan listed in the above information box.

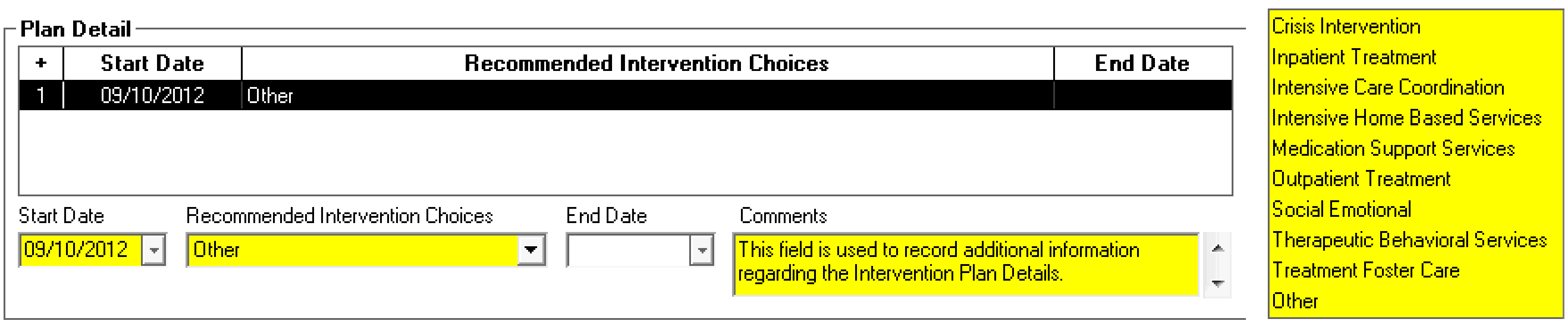


Clicking the "+" in the top left corner of the grid to enter new data will result in two mandatory fields.

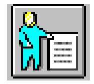


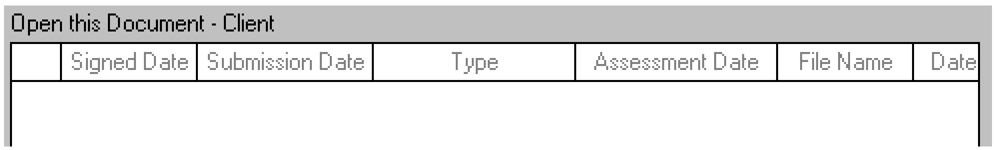
The "Start Date" will default to the same date as the intervention plan that is highlighted. It may be changed to a later date, but not to an earlier date.

Choose from the list of intervention choices, shown to the right of the information field, after clicking on the down arrow in the "Recommended Intervention Choices" field. If "Other" is selected, the comments field becomes a mandatory element.



Create New HEP (Health and Education Passport) Document

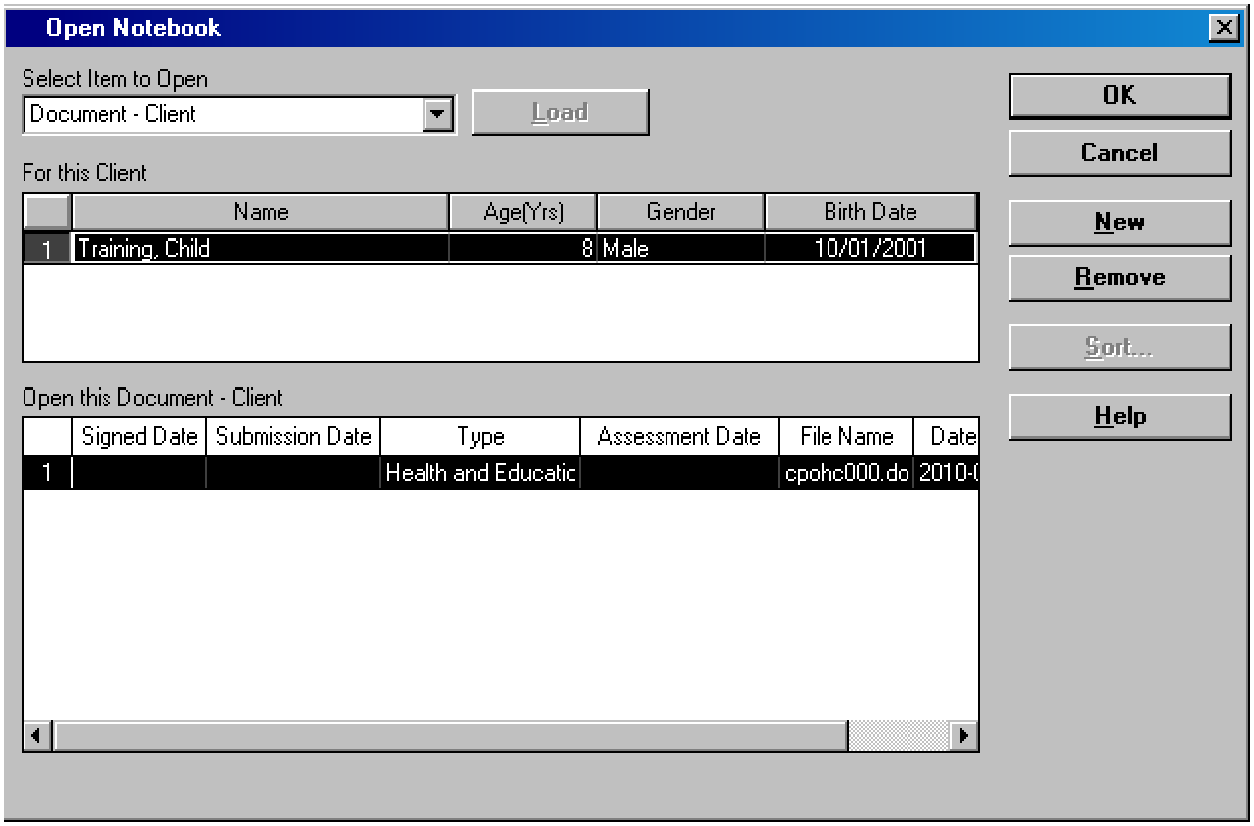
To create the HEP document, first open the case or referral for the client that the HEP will be created for. Be sure to select the "Client Management" section. The very last icon  is the open "Existing Document – Client" notebook. If that document is clicked on instead of the "+" under the icon, a list of already-created client-related documents will display.



In this case, there were no previously created documents so it is not necessary to cancel this page before you click the "+." Click on the "New" button only. 

This will create a new document. Creating new documents in this way helps to prevent accidently duplicating documents. In the case of the HEP, the application will not allow a duplicate HEP to be created. Whenever a new HEP is desired, clicking on the existing document icon is necessary, and if a HEP document exists, remove it by clicking on the "Remove" button. 

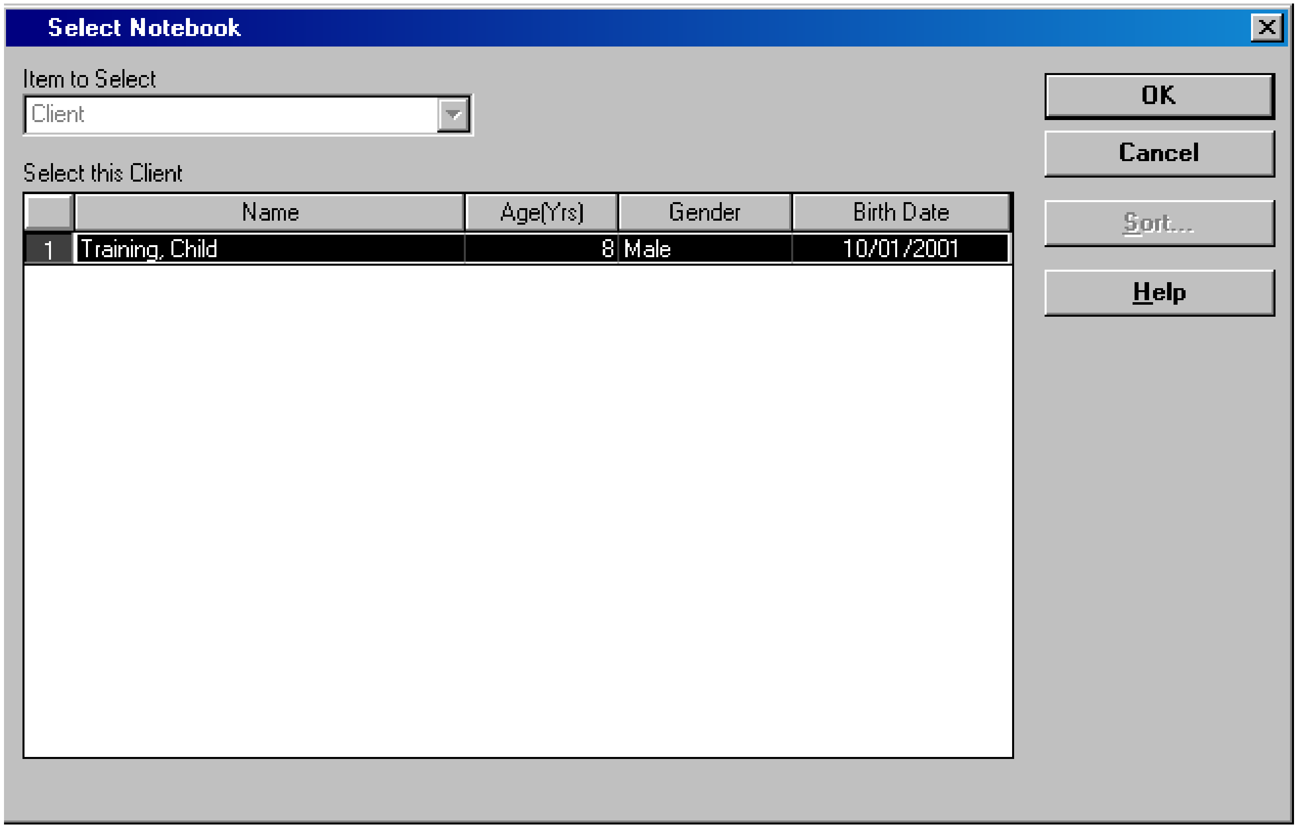
On the next page, the entire selection dialogue box is displayed, showing a created HEP with the "Remove" button enabled.



After removing the old HEP, if one was present, click the "New" button, or if there was not an existing HEP, click the "New" button. After clicking "New," a dialogue box displays. This box asks which document to create.

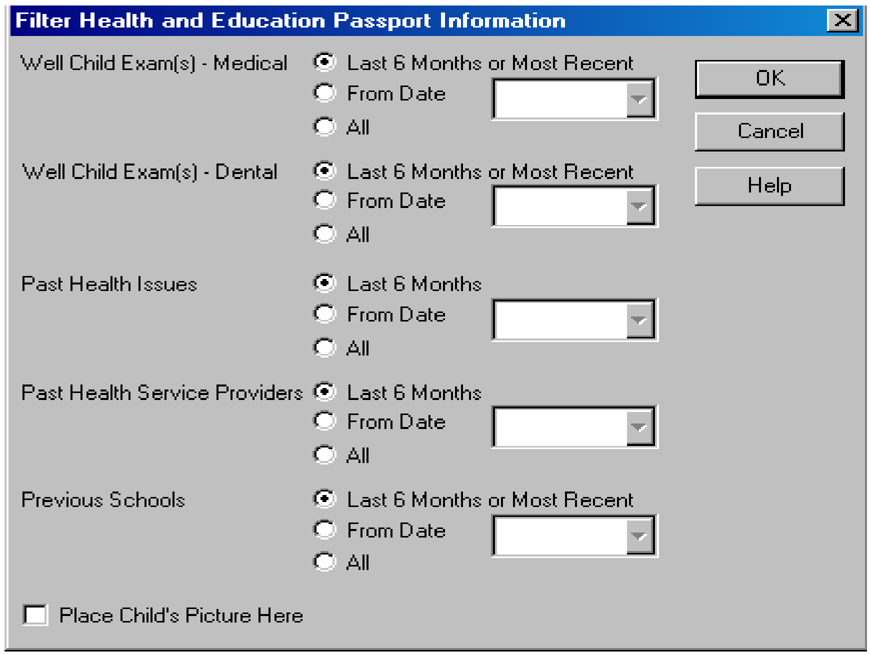
To create the HEP, select "Health and Education Passport" and then click the "OK" button.

Select the client for whom the document is being created.



Be sure the correct client is highlighted, and then click on the “OK” button.

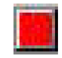
Next, select the time period for the document. The application defaults to the last six months. The user may select all history or a specific date span by using the calendar.



After selecting the desired timeframe, click on the "OK" button. This will create the HEP document.

The HEP document is a "protected" document; the user is not able to type in it or change it. All information in the document comes from somewhere in CWS/CMS. If the information is known and not in the document, enter the information into CWS/CMS, save to database, and then remove the old document and create a new HEP to get the changes included.

Directions and Conclusion

When the HEP is completed, it is important to provide it to the SCP (Substitute Care Provider) in a timely manner and to document that the HEP has been provided. To document the date the SCP was provided with the HEP and had the purpose of the document explained to them, go to the "Placement Management" section. 

Open the existing placement by clicking on the "Open Existing Placement" icon.

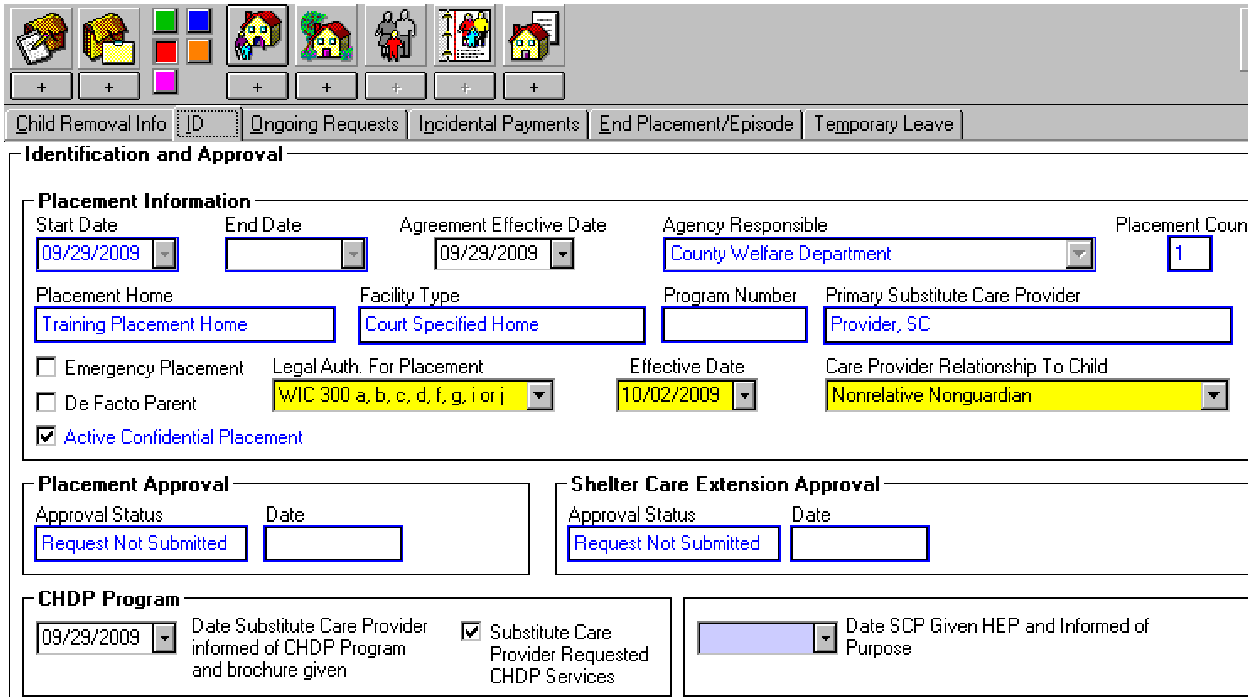
From the selection dialogue box, select the correct child then the correct placement. The correct placement is generally the current placement. The easiest way to determine the current placement is to look for the placement with <u>no</u> end date.

Open this Placement

Start Date	End Date	Rem Date	PE End Date	Reason for Rem	Fac Name	Fac Type	Age
09/29/2009	09/29/2009	09/29/2009		Physical Abuse	Temporary	NF/Other	Cour
09/29/2009		09/29/2009		Physical Abuse	Training Pl	CSH	Cour

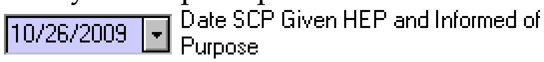
Click on the open placement to select it, then click on the "OK" button at the top right of the page.

The application will open the “Child Removal Info” page. Click on the “ID” page.



On the ID page, complete the “Date SCP given HEP and informed of Purpose” field.

Remember, regulation requires that the SCP be provided with the HEP within 28 days of initial placement and 48 hours of any subsequent placement. This example is using October 26, 2009 for the date.



Activities

Go to activity handout, Chapter 8