

## ROLES and RESPONSIBILITIES

	Case Manager	Case Planner	Case Worker	CPS Wkr/monitor
<b>INT (CPS Intake)</b>	Intake is <b>not</b> modifiable by any Local staff.			
<b>INV (CPS Investigation)</b>	Investigation is <b>not</b> modifiable by anyone with a role in the Family Services stages, unless that worker <b>also</b> has a specified role, either as primary or secondary worker in the INV stage.			

<b>FSI (Family Services Intake)</b>			Only one worker can be assigned at a time. Each narrative entry is frozen on save. Once the Intake is closed it is not modifiable.	
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<b>FSS (Family Services Stage)</b>				
<input type="checkbox"/> Demographics	X	X	X	X
<input type="checkbox"/> Relationship Matrix	X	X	X	X
<input type="checkbox"/> Caretaker	X	X	X	X
<input type="checkbox"/> Finalize Adoption	X			
<input type="checkbox"/> Progress Notes	Anyone with access to the tab may enter a note. Only the “entered by” (a person with the business function “enter progress notes” ENT PROG NO) or author of the note may update the note. Notes freeze at day 15.			
<input type="checkbox"/> <b>TCD (Tracked Child Detail)</b>	X	X	X	X
<input type="checkbox"/> Launch a <b>FASP (Family Assessment and Service Plan)</b>		X	X	
<input type="checkbox"/> <b>SA (Safety Assessment CPS within the FASP)</b>		X		X
<input type="checkbox"/> Safety Assessment Non-CPS		X	X	
<input type="checkbox"/> Family Update		X	X	

	Case Manager	Case Planner	Case Worker	CPS Wkr/monitor
<input type="checkbox"/> Family Scales		X	X	
<input type="checkbox"/> Parent Scales		X	X	
<input type="checkbox"/> Child Scales		X	X*	
<input type="checkbox"/> <b>RAP</b> (within the FASP)		X		X
<input type="checkbox"/> Risk (Non-CPS) Assessment		X	X	
<input type="checkbox"/> Assessment Analysis		X	X	
<input type="checkbox"/> Service Plan		X	X	
<input type="checkbox"/> <b>FCI</b> (Foster Care Issues)		X	X*	
	Individual narrative entries made by persons with a role of Case Worker are identified with the workers name, until consolidated by the Case Planner in areas where Case Planner Summary functionality exists. The Case Planner reviews and consolidates information and submits to the Case Manager for approval. Once approved, the FASP is frozen (not modifiable).			
<input type="checkbox"/> <b>SPR</b> (Service Plan Review)	Anyone with a role in the stage or any worker with the bf of “access service plan review” may access and update this module.			
<input type="checkbox"/> Key Dates	The Key Dates tab is view only for all workers.			

**NOTE:** If there is no Case Planner assigned, the Case Manager is then functioning as both the Case Manager and Case Planner.

\* If a worker is associated to a child **ONLY** that worker and the Case Planner can update the child scales and foster care issues.

A Case Planner may initiate the stage closing action. Only a local district Case Manager or their Supervisor may close a stage.

## **Who Can Update?**

### **Case Manager:**

- Is always LDSS staff. (One per stage, required)
- Is functioning as an approver, unless there is no other person assigned as a Case Planner. Then, the Case Manager takes on all the responsibilities of the Case Planner.
- Submits work to his/her unit approver.
- Can update demographics,
- Write progress notes.

### **Case Planner:**

- Can be LDSS or Voluntary Agency staff. (One per stage, optional)
- Is responsible for consolidating the FASP.

- Is responsible for submitting the FASP, or any Plan Amendments to the Case Manager.
- Can update demographics, write progress notes and work in the SPR.

**Case Worker:**

- Can be LDSS or Voluntary Agency staff. (Multiples per stage allowed)
- Is responsible for portions of the FASP.
- Can update demographics, write progress notes and work in the SPR.

**CPS Worker/Monitor:**

- Is always LDSS staff. (Multiples per stage allowed)
- Can contribute to certain portions of the FASP.
- Can update demographics and write progress notes.

**Specialty Functions:**

- “ENTER PROG NOTE” (Enter progress notes): allows user with this business function to enter notes by accessing the progress note tab only, via case or person search.
- “ACC SEALED ADOP” (Access sealed adoption) allows the user to access a CCR within their district or agency when it has been finalized for adoption.
- “ACC SERPLAN REV” (Access SPR) allows the user to access any Service Plan Review within their district or agency.