

Case Review Requirements and Checklist

Staff should share the Team links AND call-in information with families and all other parties prior to the meeting, unless deemed inappropriate by the Worker and Supervisor. This is for staffings and Semi-Annual Reviews (SAR).

ALL Case Review (CR) meetings are LIVE meetings and any outcome is possible. Therefore, all parties (including parents, relative caregivers, foster parents, court staff, providers, supports, etc.) should be at the table to provide input.

For All Staffings (TDMs)

1. Be prepared to discuss safety and risk items for every case.
2. Be prepared to discuss ALL efforts to locate family members and/or kin.
3. Be prepared to discuss soft checks on any party being considered for placement or safety plans.
4. Be prepared to discuss Reasonable Efforts that the agency has made to prevent removal or facilitate reunification.
5. Be prepared to discuss Concurrent Planning (CCP).
6. All youth 13+ should be invited to attend their Case Review meetings. If they are in agency custody, a Teen Waiver is required to be approved prior to the meeting for their non-attendance.
7. Assigned staff are required to invite all parties not included on the Staffing email sent by the Case Review Scheduling staff. If a custodial/non-custodial parent or legal guardian cannot be reached for the meeting, be prepared to discuss efforts to contact them and maternal/paternal family involvement.
8. Know your next court date(s) and sunset date(s)

For Intent to Grant Staffings

1. All Intent to Grant Staffings should be scheduled by a Multi-System Kids (MSK) Court Liaison.

For Permanency Planning Staffings

1. If Legal Custody (LC) to a relative/kin can be considered, the relative caregiver/proposed legal custodian is **REQUIRED** to attend the meeting.
2. The Statement of Understanding should be completed prior to the TDM if LC is being considered or discussed.
3. A Matching Coordinator should be contacted prior to the staffing to have a conversation with the perspective custodian.

For Placement Preservation Staffings

1. The Placement Preservation Prep Sheet should be completed and sent to the facilitator prior to the meeting.

Semi-Annual Review/Variable Annual Review (SAR/VAR) Checklist

SENIOR MANAGER ATTENDANCE IS REQUIRED FOR ALL MISSED SARs PER DCFS POLICY 5.02.02

For All SARs/VARs

1. Approved Case Review (CR) tool, policy requires the tool to be done 5 days in advance AND should be done on the most up to date case plan.
2. Report outs from service providers, schools, etc. (should be used to complete your tool) for all individuals-including youth.

Court Involved Cases

1. Be prepared to discuss updates from Caregivers re: youth's progress in placement.
2. Be prepared to discuss all Intensive Family Search and Engagement Efforts, update Family Tree.
3. Be prepared to discuss the Concurrent Plan (CCP).
4. Be prepared to discuss how things are going in the qualified residential treatment placement (QRTP), if applicable.

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5. Be prepared to discuss normalcy efforts.
 6. Be prepared to discuss the plan for obtaining permanency in the next 180 days.
 7. Know the next court date(s) and sunset date(s).
 8. Updated Medical and Education (Med/Ed) Forms should be entered in SACWIS.
 9. Be prepared to discuss the visitation plan and how things are going, and if changes are needed.
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Before the SAR

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1. Send the SAR Coversheet completed in Traverse (prior to the meeting) to the facilitator.
 2. Send an updated photo of child(ren), within 1 year to the facilitator.
 3. Send the completed Teen Waiver to the facilitator, if teen will not be in attendance (if applicable) prior to meeting.
 4. Send the Child Study Inventory (CSI/CSI Update), if applicable, to the facilitator. These should be done in Traverse.
 5. Contact the schedulers in advance if you need extended time OR you need to add a TDM to your SAR.
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For ALL Adoption (Permanent Custody (PC) granted) Cases

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1. Completed and signed CSIs (within 30 days of PC being granted) or CSI Updates (completed at the time of each SAR, adoptive placement and removal from adoptive placement). The link below (in blue) will take you to the OAC to assist you with what needs to be included and when.
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[Rule 5101:2-48-21 - Ohio Administrative Code | Ohio Laws](#)

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2. Be prepared to discuss outcome of last Adoption Matching Conference (AMC) and know the date of the last AMC.
 3. Be prepared to discuss recruitment efforts for this review period and plans moving ahead.
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For Cases w/ Teens

- 1. Teens 13 y/o+ MUST attend unless there is a Teen Waiver completed in advance.**

- 2. A completed Independent Living Plan/Transitional Living Plan (ILP/TLP) for teens 14 y/o +, including 2 youth support people is needed.**

- 3. Credit report info should be requested annually for teens 14 y/o +.**

- 4. Teens are expected to attend and participate in Case Review Meetings. Assigned staff should schedule the meeting in advance to accommodate the youth's schedule. School, work, etc. are not acceptable excuses for a teen to not participate in their meeting. If a teen is unable to attend a meeting, a Teen Waiver must be created and include the teen's input. Teen Waivers are to be completed and signed in advance and will not be accepted after the meeting.**

Updated 5/17/23 by KRS and JP