

# Big Bend Community Based Care Policy & Procedure

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<b>Series:</b>	400: Child Welfare Services	
<b>Policy Name:</b>	Case Note and Meeting Documentation	
<b>Policy Number:</b>	406	
<b>Origination Date:</b>	03/09/09	<b>Revised:</b> Board Meeting of 12/13/2018
<b>Regulation:</b>	Ch. 39, F.S. 65C-11.002, F.A.C. CFOP 170-1	

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## Policy

It is the policy of Big Bend Community Based Care, Inc. (BBCBC), that each child provided child welfare services through our Network has a specific record of all case activities maintained in the Florida Safe Families Network (FSFN) by providers with system access.

Each child record in FSFN must contain a specific record of all case activities provided by the case manager or other child welfare professionals working on the case who have FSFN access. Notes create a point-in-time log of the child welfare professional's activities. Case notes and documentation of meetings create an audit trail for compliance with federal and state requirements. Case notes are a vitally important record of activities pertaining to any given case and are used to transfer information about a case within the Department, among case managers and service providers and in court. Up-to-date notes ensure that information known and activities that have been occurred are known to any other person who needs to access immediate and relevant information about a case or provider. A DCM/DCMS notes may be subpoenaed and used as evidence in legal proceedings.

## Procedure

### A. Individual Contacts with Children, Parents and Other Team Members.

1. All case activities, including contacts and attempted contacts with a child, the child's parent or caregiver and collaterals must be entered in FSFN no later than two (2) business days after the actual contact or other event.
2. Notes are automatically date and time stamped with the date and time that the note was entered. The DCMS/DCM responsible for the note entry will enter the actual contact begin and end date and time. The DCMS/DCM will also complete the note category, type and participants to whom the note pertains.
3. When a face-to-face contact is required, the "Face-to-Face" hyperlink on the FSFN case note page should be completed in order to document for each participant selected whether a face-to-face contact was completed, attempted or not attempted. A "Reason Not Seen" will be provided for face-to-face contacts that were attempted or not completed.
4. Case notes will provide the most pertinent facts gathered and observations about the child or family that will be used in developing or updating a family assessment or FFA-O, Progress Update, Other Parent Home Assessment, any type of home study or other case record documentation.

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- a. Case notes will contain cohesive information that provides a summary of what was learned as a result of the contact or effort to achieve the contact.
  - b. Case notes shall not contain a specific reference to the child's or any other family member's HIV infection or AIDS. A general term such as child's "chronic illness" will be used.
  - c. Conclusions, opinions or analyses that are gathered from persons contacted must be labeled as such and attributed to the person making them. Notes may only reflect phrases, quotes, sentence fragments, lists.
5. A FSFN user may create a chronological note for another user provided he or she logs into FSFN using his or her unique and assigned User ID and password. Under no circumstances should a FSFN user ever log into the system using another person's User ID and password.
- a. If the "DCMS/DCM Making Contact" is not the same as the person for whom the FSFN user is creating the note, this this should be clearly documented and explained in the chronological note narrative section.
  - b. The FSFN user for whom the note was created is responsible for validating the accuracy of the information.
- B. Team Meetings, Hearings, Staffings, Etc.** The FSFN Meeting page will be used to formally document meetings, participants and meeting outcomes. The Meeting page may also be used to schedule a meeting and notify intended participants.
1. The Meeting page will be used to document the following:
    - a. Administrative Review
    - b. Adoption Applicant Review Committee
    - c. Adoption Match Staffing
    - d. Adoption Meeting
    - e. Adoption Quarterly Staffing
    - f. Case Plan Conference
    - g. Case Staffing
    - h. Case Transfer Staffing
    - i. Child Protection Team Staffing
    - j. Children's Medical Services Staffing
    - k. Comprehensive Medical Assessment Team Staffing (CMAT)
    - l. Human Trafficking Staffings
    - m. Department of Juvenile Justice Staffing
    - n. Educational Meeting
    - o. Family Team Conference
    - p. High Risk Staffing
    - q. Independent Living Staffing
    - r. Investigations Meeting
    - s. Legal Consultation
    - t. Legal Meeting
    - u. Legal Staffing
    - v. Mediation
    - w. Medical Staffing
    - x. Mental Health Staffing
    - y. Multi-Disciplinary Staffing
    - z. Other Meeting
    - aa. Other Staffing
    - bb. Peer Review Meeting
    - cc. Permanency Planning
    - dd. Permanency Staffing
    - ee. Placement Meeting
    - ff. Pre-Trial Conference
    - gg. Reunification Staffing
    - hh. Safety Management Staffing
    - ii. Safety Planning Meeting
    - jj. Separated Sibling Staffing – Adoption
    - kk. Separated Sibling Staffing – Placement
    - ll. Service Staffing
    - mm. Supervisory Meeting
    - nn. Transfer Staffing (Between Programs)
    - oo. Transition Planning – Initial
    - pp. Transition Planning – Ongoing
    - qq. Transition Planning – Closure
  2. The following information about meetings will be recorded:

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- a. Date and time of meeting.
  - b. Brief statement as to reason for meeting and outcomes, in particular any decisions made.
  - c. Participants.
  - d. Meeting type as listed above.
3. When a required monthly face-to-face contact with a parent/legal guardian occurs during a meeting, in addition to the meeting documentation the contact should be documented in Case Notes. The face-to-face contact note should describe any conversation with the parent that is not reflected in the Meeting note. A cross reference to the Meeting note should also be provided.
  4. Other than face-to-face contacts, there should not be a duplicate entry in Case Notes about a meeting documented in the meetings page.

## **C. FSFN Documentation.**

1. The FSFN Supervisor Consultation page will be used to document all of the following:
  - a. All required consultations with case managers associated with FFA-O or Progress Updates.
2. The FSFN Case Note page will be used to document ongoing case management activities as follows:
  - a. When a case note is about a face-to-face or other type of contact with a case participant, the participants must be selected using the FSFN functionality for all note types to document specifically who was seen or interviewed.
  - b. The Note type of "Review, Supervisor" should be used for required case reviews.
    - i. Supervisory review notes will document which case participants were included in the review.
    - ii. When the review also serves the dual purpose of a required supervisor consultation, a cross reference should be entered in Supervisor Case Consultation page to ensure credit for required consultation (do not enter same details or "cut and paste;" only enter a brief cross reference).
  - c. The Note type of "Supervisor Consultation" should be used for consultations associated with including any required safety plan management activities such as approval of a Family-Made Arrangement, Judicial Reviews and other case planning/monitoring activities.