**Toolkit:** Triage Model

**Source:** Onondaga County, 2018

**Overview:**
Onondaga County’s Triage Model is their core front-end strategy in shifting to family-based placements. They developed the concept of a time-bound “triage” that brings together the key partners on a case, including family, to make a thoughtful family-based placement that is well-supported.

A dedicated Triage Team works to ensure a kin-first placement and a smooth case transfer between CPS and Foster Care for all new entries within 72 hours of removal. It involves gathering case history, identifying family resources, completing required court documents and providing wrap-around supports to make the placement successful.

Individuals involved in the Triage process may include:

- Permanency Coach
- Triage Team Lead
- Intake Worker and Supervisor
- Permanency Worker and Supervisor
- Hard-to-Place worker
- Home-finder
- Family Finding Specialist
- Family Team Meeting Coordinator

Not only has the Triage Model led to more family-based care, it also decreased approval times for safety assessments of homes, for supplies and material needs of kin families, and has increased the preparedness of workers in court which has increased the family court’s confidence in approving kin placements.

Enclosed in this toolkit are the following documents, forms and check-lists:

1. Case Transfer Policy
2. Flow Chart with Unit Roles
3. Triage Team and Transfer Meeting Process
4. Transfer Meeting Agenda and Checklist
5. Triage Checklist B
6. Transfer Summary Form
Placement Cases: Investigations → Triage → Permanency

Case Transfer Process as of 2/16/18:

Please see the attached document for a depiction of the case flow and a detailed listing of the roles and responsibilities of the Investigations, Triage and Permanency workers/supervisors.

Below is the process for Transfer meetings regarding cases that are being transferred from Investigations through Triage and on to Permanency.

- Once a petition for removal from the home has been filed, the investigative worker will submit the case for assignment to Triage and Permanency
- Transfer meetings are expected to occur within one (1) week from the time of assignment
- Prior to the Transfer meeting, the Investigative worker, the assigned Triage Team member and the assigned Permanency worker are expected to “meet” to discuss the case
- The Investigative worker will complete the Transfer Summary form and attach an updated Face Sheet in advance of the Transfer meeting and distribute both via email to all parties prior to the meeting
- At the Transfer meeting, the Investigative worker will review the Transfer Summary form and updated Face Sheet. The Triage Team member will review the Triage Checklist and Family Resource form; and provide updates regarding the child(ren)’s placement, visitation, consents, etc. The Permanency worker will receive relevant documents and clarify any outstanding issues and next steps.
- Transferring workers are responsible for attending the first court appearance and if possible, the Triage Team member and receiving Permanency worker should also attend. Attendance at subsequent court appearances will be decided at the Transfer meeting.

Toolkit: Triage Model, Case Transfer Policy
Flow Chart and Unit Roles/Responsibilities for Placement Cases

Investigation Indicated?

- **Yes**
  - Child at Home?
    - **Yes**
      - Direct Preventive Case
    - **No**
      - Case Closed-No Services; or Open Services Case
- **No**
  - Relative Placement
  - Foster Care
  - Referral to Triage Team (Referral Form w/ Notes)
  - Permanency Worker Assigned
  - “Meeting” between Investigator, Triage Team Member & Permanency Worker w/in 3 Business Days of Referral
  - Case Transfer Meeting

**Investigations/DP Roles/Responsibilities:**
- Complete Transfer Summary (Revised)
- Conduct and Record UNCOPE Assessment
- Complete FASP up to Service Plan
- File Eligibility Application; or meet with Eligibility
- Determine ICWA eligibility
- Secure “Consent to Place”
- Secure Releases, to the degree possible
- Approve Relative Placement, if appropriate
- Attend Court Dates; as appropriate
- Bring copy of Petition to Transfer Meeting

**Triage Team Roles/Responsibilities:**
- Attend Court Dates; as appropriate
- Complete Triage Checklist
- Complete Family Resource Form & Genogram
- Explore Relative/Kin Options
- Conduct Safety Assessments; as necessary
- Provide material support to placement family
- Assist with any incomplete tasks from Investigations (e.g., consents, ICWA, etc.)
- Indicate Paternity Status
- Determine Short-term Visitation Plan
- Complete Referrals (e.g. Family Meeting, Family Place, Family Finding, etc.)

**Permanency Worker Roles/Responsibilities:**
- Make contact with Investigations, Triage w/in 3 business days of assignment
- Attend next court date following transfer
- Formulate a visitation plan w/in 3 days of transfer
- Meet the child(ren) and bio parents w/in 7 days of transfer
- Complete the Service Plan w/in 14 days of transfer
- Discuss permanency options w/ relative/suitable other placement w/in 30 days of transfer
- Supervisor enters CCRS codes for petition; and opens Tracks for relative placement

Toolkit: Triage Model, Flow Chart with Unit Roles
A summary of Onondaga County’s Triage Team and Transfer Meetings protocol and process:

**Casework Philosophy:**
- A renewed emphasis on family/kin!
  - Children have better outcomes when placed with relatives/kin
  - A renewed emphasis on finding and engaging relatives/suitable others
- Removal of a child from their home is a traumatic event for the child and family!
  - The first 72 hours after a removal require a high level of intense casework
  - Identifying underlying issues quickly allows the team to formulate a service plan that is unique to the family
  - The level of care at which the child is placed needs to be assessed early and often and children need to be placed in the least restrictive, most supportive setting.

**Overview of Triage Team Process:**
- Up front review of the safety of the placement: In the home, “eyes on”, initial home assessment
- Intense, up-front support for all placements to stabilize the placement for 30 days until a full plan is developed with the Permanency Worker
- Smooth hand-off to needed referrals and services (Enhance Clinic, Family Visitation, Family Finding); getting the right information to community agency partners up-front to increase communication of the plan
- Increasing the stability of all placements up-front and increasing the supports of kin and relatives will reduce movements in care and allow permanency workers to focus on getting to permanency in a timelier manner

**Triage Specifics:**
- Work incoming placement cases during the first 72 hours of placement
  *Includes all incoming JD/PINS cases, foster care placements, relative placements, and safety plans made by CPS pending filing of N-Petition or Voluntary
  *Placing worker accesses the Triage Team by completing a referral form as soon as a child has been physically removed (A neglect petition/modification/voluntary MUST be imminent)
  *Triage Team completes the 72-hour Check List and facilitates a 72-hour meeting (transfer meeting)
  *It may be necessary for the Triage Team to stay involved and follow-up with the work started
- Work on all cases in which children are placed at Family Support Center
  *Triage Team Lead will be required to remain on the case for the duration of the child’s stay at FSC. Will work with assigned Permanency Worker
## Placement Case Flow and Worker Responsibilities:

<table>
<thead>
<tr>
<th>Placing Worker</th>
<th>Triage Team</th>
<th>Permanency Worker</th>
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</thead>
<tbody>
<tr>
<td>CPS Investigator will come off rotation during the 72 hours after a removal.</td>
<td>Begins working case as soon as notification is received by Permanency Coach about new placement</td>
<td>Will be made aware of their assignment to the case</td>
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<tr>
<td>This time is spent entering progress notes, filing the petition, physical removal of the child, launching FSI/FSS, completing the FASP up to the service plan, completion of the transfer summary, eligibility, and Homefinding referral</td>
<td>Will complete checklist, case master record sheet, family resource form, gather documents, establish paternity</td>
<td>Become involved as soon as possible, however, it is the Triage Team Lead’s (TTL) responsibility to complete the tasks on the checklist.</td>
</tr>
<tr>
<td>Complete the clearance of relative placement and determine whether it is safe and appropriate</td>
<td>Home visit to placement resource (relative or foster home), assess needs to stabilize placement. Provide financial support and referrals for services to support the placement.</td>
<td>Can expect ongoing support from the TTL as necessary, including remaining on the case for any placements at Family Support Center.</td>
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<tr>
<td></td>
<td>Seek out relative resources for children in foster care and conduct “safety assessment.” Make recommendation regarding placement</td>
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<td></td>
<td>Make referral for emergency foster care certification</td>
<td>Complete FASP by creating service plan goals.</td>
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<tr>
<td>Preventive worker will do the physical removal of the child, enter progress notes, complete a plan amendment, eligibility, and Homefinding referral</td>
<td>Support a smooth transition to the permanency worker</td>
<td></td>
</tr>
<tr>
<td>Complete the clearance of relative placement and determine whether it is safe and appropriate</td>
<td>Remain involved as a support to permanency worker after the transfer meeting when necessary (e.g., Family Support Center placements)</td>
<td></td>
</tr>
<tr>
<td>Will attend 72-hour meeting and first court appearance</td>
<td>Facilitate and coordinate transfer meeting and attend the first court appearance</td>
<td>Will attend 72-hour meeting and first court appearance</td>
</tr>
</tbody>
</table>
## Case Transfer Meeting Agenda/Checklist

### Case Information
- **Case Name:** _________________
- **Meeting Date:** ____________
- **Placing Worker/Triage/Permanency:** _______________________________________
- **Referral Date:** ______________
- **Placement Date:** _____________
- **Foster Care or Relative Placement:** ___________
- **Child’s Name:** ______________________
  - **DOB:** ______________
- **Additional Children:** ______________________
  - **DOB:** ______________
  - ______________________
  - ______________________

### Attendees

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<thead>
<tr>
<th>√</th>
<th>Placing Worker</th>
<th>Next Steps</th>
<th>By Whom/Date</th>
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<tbody>
<tr>
<td></td>
<td>Connections Face Sheet/Case Composition</td>
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<tr>
<td></td>
<td>Brief History of Case</td>
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<tr>
<td></td>
<td>- Review Transfer Summary</td>
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<td></td>
<td>- UNCOPE Score(s):</td>
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<td></td>
<td>- Proposed Disposition</td>
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<td>Court Update</td>
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<td></td>
<td>- Next Court Date:</td>
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<td>FASP Competed to Service Plan</td>
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<td>Eligibility (App to Jackie Woods)</td>
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<td></td>
<td>Other Issues/Concerns:</td>
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### Triage Team Worker

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<thead>
<tr>
<th>√</th>
<th>Triage Team Worker</th>
<th>Next Steps</th>
<th>By Whom/Date</th>
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<tbody>
<tr>
<td></td>
<td>Review Triage Checklist</td>
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<tr>
<td></td>
<td>Review Family Resource Form</td>
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<td></td>
<td>Summarize Relative/Suitable Other Options</td>
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<td></td>
<td>Summarize Safety Assessment(s)</td>
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<td></td>
<td>Child Last Seen in Placement Date:</td>
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<td>Paternity</td>
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<td>Visits</td>
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<td>Family Meeting Referral</td>
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<td>Follow-up Issues:</td>
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| √ | Permanency Worker | Next Steps  
By Whom/Date |
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<tbody>
<tr>
<td></td>
<td>Questions/concerns based on what you’ve heard so far</td>
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<td></td>
<td>Additional information needed</td>
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<td>Other Issues/Concerns:</td>
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| √ | Other Needs/Referrals (if appropriate) | Next Steps  
By Whom/Date |
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<td></td>
<td>Family Support Center</td>
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<td>Home Finding</td>
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<td>Family Finding</td>
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<td>Emergency Certification</td>
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<td></td>
<td>Relative Home Study</td>
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<td>Other Issues/Concerns:</td>
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| √ | Services Summary | Next Steps  
By Whom/Date |
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<td>Existing Services:</td>
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<td>Referred to Services:</td>
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<td></td>
<td>Additional Services Needed:</td>
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</table>
# Triage Checklist

**Case Name:**

<table>
<thead>
<tr>
<th>Child</th>
<th>FC/Rel</th>
<th>Address</th>
<th>Phone</th>
<th>Misc</th>
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## FSC/FOSTER CARE/RELATIVE PLACEMENT

- ☐ Clothing Voucher:
- ☐ Daycare:
- ☐ WIC
- ☐ Enhance:
- ☐ School:
- ☐ Placement Letter
- ☐ Bill of Rights (14+):
- ☐ Grantee Application:
- ☐ Food Voucher:
- ☐ Items Purchased:
- ☐ Other:

## DOCUMENTS

- ☐ Birth Certificate:
- ☐ ICWA:
- ☐ Birth Records:
- ☐ Consent to Treat:
- ☐ Religious Preference:
- ☐ Putative Father Registry:
- ☐ Acknowledgement of Paternity:
- ☐ Order of Filiation:
- ☐ Letters sent to absent fathers:
<table>
<thead>
<tr>
<th><strong>Family Resource Form:</strong></th>
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<tbody>
<tr>
<td><strong>Medical Records:</strong></td>
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<tr>
<td><strong>Case Master Record:</strong></td>
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<td><strong>Other:</strong></td>
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**MISC**

<table>
<thead>
<tr>
<th><strong>Emergency FC Cert?</strong></th>
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<td><strong>Rel Home Assessment?</strong></td>
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<tr>
<td><strong>Family Place Referral?</strong></td>
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<tr>
<td><strong>Bus Passes?</strong></td>
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<tr>
<td><strong>Connections Assignment?</strong></td>
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<td><strong>Photo of child in case file?</strong></td>
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<td><strong>Other</strong></td>
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**IMPORTANT DATES**

<table>
<thead>
<tr>
<th><strong>Next Court Date/Part/Reas PH Date:</strong></th>
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<tr>
<td><strong>Next Enhance Appt:</strong></td>
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<tr>
<td><strong>Date of last child/parent visit:</strong></td>
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<tr>
<td><strong>Date Child was last seen in Placement:</strong></td>
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<tr>
<td><strong>Other Information:</strong></td>
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</tbody>
</table>
TRANSFER SUMMARY

(For Investigations → Triage → Permanency Cases)

*ATTACH UPDATED FACE SHEET TO TRANSFER SUMMARY

Case Name:

Case Number: S  Today’s Date:  CID Date:

Transferred From – Worker’s Name:  Supervisor:

Transferred To – Worker’s Name:  Supervisor:

Case Type (select one):  - Foster Care Placement  - Relative Placement

Child’s Name(s):  DOB(s):

Initial/Subsequent Placement(s):
Name/Relationship (if any):
Address:  Phone #:

Current Investigation Summary:

Case History (including services history):

Court Status:
Type of Petition:  Docket Number:  Family File #:

Date Filed:  Judge:

Respondent(s):

Date of Initial Removal:  Type of Removal:

Temporary orders from previous Court appearances:

Attorneys:
Name(s):  Phone #(s):

Permanency Hearing Date (aka Date Certain):

Date of Next Court Appearance and Purpose:

Eligibility:
Has Eligibility Unit been notified of this foster care placement or relative case opening?  Yes  No
Is FASP completed up to the Service Plan?  Yes  No
Have Removal Information tabs been completed?  Yes  No

Toolkit: Triage Model, Transfer Summary Form
**ICWA:**
Tribal Affiliation: Yes  No  **If yes, to which tribe?**  Notified? Yes  No
Who provided information?  Documented in Progress Notes? Yes  No

**UnCope Screening Form Completed:**  Yes  No
Person Assessed:  Person Assessed:
Score:  Score:
Referral Made: Yes  No  Referral Made: Yes  No

**Services:** (please include agency name/phone number and indicate who is receiving the service. Also include any referrals which have been made and are pending. Include signed releases)

Based on your investigation, if there are services you would recommend, please list:

Are there others in the home that are not being serviced?  Yes  No
If so, please list names and DOBs:

**Medical Providers/ Medications for children:** (Include phone numbers and who is receiving service/Medication)

If needed, do all the children have their medications with them?  Yes  No

**Schools/Daycare:** (include phone numbers and who goes where, if there are any 504 plans, IEP’s, Special Education and /or early intervention)

**Relatives/Suitable Others:**
Have parents or children given you any names/phone numbers of other relatives or suitable others who might be able to care for these children?  Yes  No

If yes, please list names/relationships and phone numbers:

Name/Relationship:  Phone #:
Name/Relationship:  Phone #:
Name/Relationship:  Phone #:

**Additional Items/Issues:**
Paternity (see Triage Checklist)
Placement information (see Triage Family Resource Form)
Visitation Plan (see Triage Checklist)
Consents (see Triage Checklist)