

CFSR Scheduling Tips and Checklist Case Management Prep

If listed as primary in FSFN:

- ☐ Complete face sheet as thoroughly as possible. The completed face sheet including interview schedule is due by the close of business _____. Email the completed face sheet to _____.
- ☐ Schedule interviews with as many participants in the case as possible to include: child, parents, caregivers, providers, etc. Home visits are preferred for interviews with the child and caregivers. Provider interviews may be scheduled at the review site or office of the provider. Explain the purpose of the CFSR to case participants.
- ☐ Consider drive time when scheduling interviews. Each interview will take approximately 30-45 minutes.
- ☐ The first scheduled interview should be with the person assigned as primary in FSFN followed by any out of county case manager and/or CPI if a report was received during the period under review (insert period under review dates). Parent, child and caregiver interviews should follow the CPI/case manager interviews with provider interviews scheduled last. If this schedule is not possible, please discuss with Quality Management Specialist who is the lead for the corresponding review week.
- ☐ For interviews occurring in the service center, private office space will be needed to complete interviews. For this review, _____ has offices available for reviewers for this purpose.
- ☐ Make sure the location/address where the interview will be held is clearly indicated on the face sheet along with a contact number for the person to be interviewed. It is possible reviewers may run ahead or behind schedule as some interviews will take longer than others. Prepare participants that this is a possibility, so they will not be surprised if this occurs.
- ☐ Face-to-face interviews are preferred; however, telephone interviews are permissible if circumstances warrant.
- ☐ If the same case manager/CPI/provider or GAL is working with more than one family, coordination of interviews will need to occur so two interviews with the same person are not scheduled at the same time. **This is extremely important.**

- ☐ Once the interview sheets are provided to the Review Site Leader (insert name of Quality Management Specialist/site leader), review teams will be assigned.
- ☐ Debriefs with the Case Manager, Supervisor, and Team Manager (to the extent possible) will be held beginning at 10:00 AM on the third day of the review. Please make every effort to attend.

Proposed Review Schedule

Note: If interviews for the primary in FSN, out of county case manager, or CPI(s) need to be scheduled outside the times listed below, please contact _____.

Day 1		Day 2		Day 3	
8:30 AM	Reviewers Gather and begin File Review	9:00 AM	Participant Interviews	9:00 AM	Review Teams finalize ratings and prepare for debriefs.
10:45 AM	CM & CPI Interviews. Schedule individually-approximately 30 to 45 minutes for each interview.	10:00 AM	Participant Interviews	10:00 AM	Review Teams begin debriefs.
TBD	Lunch	TBD	Lunch		
1:30 PM	Any CM/CPI interviews not completed in the morning. Begin interviews with Parent/Caregiver/Provider/GAL (schedule only one during this time slot if travel required; two if interviewing at the office)	1:00 PM	Participant Interviews Review Teams Begin Completing Review Instrument and Rating Sheets. Provide Rating Sheets to site leaders.		
2:45 PM	Child/Parent/Caregiver/GAL or provider (schedule one interview during this time slot if travel required; two if interviewing at the office).				