Child and Family Services Reviews Online Monitoring System User Manual

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U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES
ADMINISTRATION FOR CHILDREN & FAMILIES
Administration on Children, Youth and Families
Children's Bureau

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Contents

Figures/Tables

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Child and Family Services Reviews Online Monitoring System User Manual

Section I: Introduction

This manual provides an overview of the Child and Family Services Reviews (CFSR) Online Monitoring System (OMS) and will guide you as you access the site, enter case-level review data, document stakeholder interviews, and generate reports. The manual also describes each OMS role (Reviewer, Site Leader, OMS State Administrator, and Observer), and the access each has to specific case and interview creation and quality assurance functions within the OMS.

Use this manual in conjunction with the Onsite Review Instrument and Instructions (OSRI) and the Stakeholder Interview Guide (SIG). The manual focuses on the technical use of the system and does not include information about understanding and answering the questions in the instruments. Please also visit the CFSR Information Portal and E-Training Platform for additional OMS and Round 3 training resources at https://training.cfsrportal.acf.hhs.gov.

About the OMS

The OMS is a Web-based application consisting of the OSRI, the SIG, and reporting tools. The OMS provides online automated OSRI and SIG instruments and tools that enable state and federal CFSR participants to conduct CFSR activities consistently. The OMS is used for states conducting both Traditional Reviews and State Conducted Case Reviews.

In addition, states can use the OMS for continuous quality improvement (CQI) and training purposes. CFSR case data, CQI case data, and training data are maintained separately. Therefore, states may practice entry of cases for training purposes without accessing or affecting state CFSR or CQI data.

Children's Bureau Central and Regional Office staff and state staff will have access to OMS-generated reports that inform the determination of states' compliance with federal child welfare requirements. These reports may also be used to inform states' development of Program Improvement Plans (PIPs) that address areas in their child welfare systems needing improvement. If a state uses the OMS for its own CQI purposes, the results will be accessible to the state only, unless the state permits Children's Bureau access.

Section II: Getting Started

The OMS is a Web-based application accessible to authorized users on most common platforms, including desktop computers, laptop computers, and some mobile devices. For platforms smaller than a tablet, use of the OMS may be available, but such platforms are not supported at this time.

For best results, you should access the OMS on a laptop, multi-function tablet, or desktop computer that has a minimum level of hardware and software. Authorized users can access the OMS through the CFSR Information Portal. The OMS will automatically log users out of the system after 60 minutes of inactivity. At 55 minutes of inactivity, an orange bar will appear at the top of the page warning you that you will be timed out after 5 more minutes of inactivity.

The minimum system specifications required to use the OMS include:

- Windows 7.x, 8.x, or 10.x with latest updates, or OS X 10.6 or later (patched with latest updates)*
- CPU: Intel Core i5 (or competitor equivalent) with 2 gigabytes (GB) of RAM (4 GB recommended) and minimum 200 megabytes (MB) of free disk space
- Screen resolution: XVGA (1024 x 768) or higher recommended to format the document properly on the screen
- Browser: these three supported browsers must be updated with the latest patches and updates: Microsoft Internet Explorer (IE) 10.x or higher; Google Chrome; Mozilla Firefox
- Browser setting: JavaScript and cookies enabled
- Additional applications may be required to view reports, including Adobe Acrobat and/or Windows Office 2007 or higher
- Broadband Internet connection or Wi-Fi connection

* Note: The OMS may run in environments other than those listed above; however, use has not been thoroughly tested in all environments and may not be supported.

To assist the user, the OMS displays instructions and definitions throughout its pages that can be displayed or hidden on each individual page. The OMS also has built-in logic to assist in completing the instruments accurately and consistently. While the built-in logic (and the associated messages that may appear) is implemented to streamline data entry into the OMS, it may sometimes be helpful to refer to complete lists of logic in the tables in Appendix A of this manual. These tables include each logic scenario and the associated error message that will display if triggered. A triggered error message will provide clear instructions about what change needs to be made before you can proceed.

Only authorized users can access the OMS. States will identify staff authorized to access their state's OMS CFSR Site, OMS CQI Site, and/or OMS Training Site. The Children's Bureau Regional Offices will work with each state to identify state staff who will be using the OMS and their role in the reviews. Upon receiving those names and roles, JBS International, Inc. (JBS) will set up each OMS Review Site on behalf of the state. States may add state staff to their review(s) on an ongoing basis.

Accessing the OMS

Once you have set up your account on the CFSR Information Portal, you can access the OMS Training Site to familiarize yourself with the OMS using mock data (deleted from the site monthly). If your state has requested a CQI review on the OMS, or is participating in a CFSR, then you will also have access to the OMS Review Site. To access the OMS, you must first log into the portal (https://www.cfsrportal.acf.hhs.gov) using two-factor authentication (TFA). TFA is a federal security requirement for all portal and OMS users, to increase the security of all accounts and the data within the sites. New portal users are sent instructions on setting up and using TFA to access their portal accounts.

A. Login

After you log into the portal, click either the blue rectangle at the bottom of the portal's home page that says "CFSR Online Monitoring System" or click the "OMS" tab across the top of the page, and then click either the blue button on the left that says "Go To OMS Review Site" or the blue button on the right that says "Go To OMS Training Site."

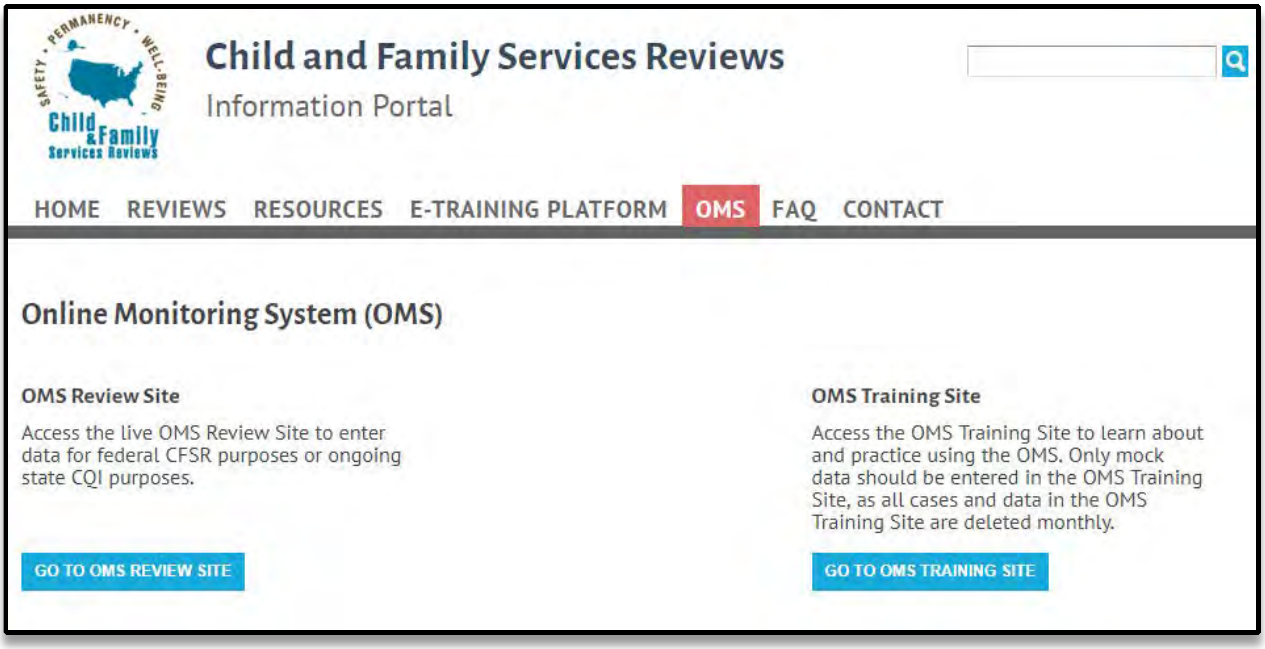
If you attempt to access the OMS using an unsupported browser type (or an outdated version of one of the supported browser types), you will receive a popup that reads:

> Your browser may not be compatible with the OMS. You are currently using [Internet Explorer/Firefox/Chrome/Safari] version [browser version]. Please update [Internet Explorer/Firefox/Chrome/Safari] to the latest version, or access the OMS from a different browser. By proceeding, you acknowledge that you are accessing the OMS from an unsupported browser version and that as a result you may encounter limited functionality.

Clicking "Acknowledge and Proceed" will enter you into the OMS. Users will not be prevented from entering the OMS when using an unsupported browser, but must acknowledge that they may experience limited functionality as a result. If you access the OMS using a supported browser, you will not see the popup message.

Your OMS role is pre-configured to your OMS account. Regardless of the number of OMS roles you play, or the number of reviews to which you may have access, you will always access the OMS the same way, through your portal account. If you cannot remember your username or password to log into the portal, or want to change your password, please visit the portal and click "Forgot username and/or password" on the home page (https://www.cfsrportal.acf.hhs.gov/user/password).

Figure 1: OMS Login Page



Once you have successfully logged into the OMS, read the system use notification on the next page, and indicate that you agree to the terms and conditions by selecting the checkbox and "Submit" button at the bottom of the page. All users must accept the system use notification the first time they log into the OMS, and then again every three months.

B. User Roles

The OMS features eight different review roles—State Reviewer, State Site Leader, Federal Reviewer, Federal Site Leader, Consultant Reviewer, Consultant Site Leader, OMS State Administrator, and Observer—to manage the case review, interviews, and Quality Assurance (QA) process. Each of these roles has specific functions and limited capabilities that clearly define each role's involvement in the process.

Depending on your role and whether the review is being conducted as part of a CFSR or an ongoing CQI review, certain OMS functions and pages within the OMS will be accessible or restricted to you. Information on the Reviewer, State Site Leader, and Federal Site Leader roles is provided in sections IV (The OSRI) and V (The SIG). The following is a description of the OMS State Administrator and Observer roles. Detailed instructions for the OMS State Administrator are found in Section VII below.

OMS State Administrator. Users assigned the system role of OMS State Administrator have additional responsibilities. OMS State Administrators can set up and manage several aspects of the state's OMS Training Site, CQI Review Site, and CFSR Review Site (for states conducting their own case review). OMS State Administrators have all the privileges associated with Reviewers and State Site Leaders described below and may create a case, assigning themselves as the Reviewer on that case. In addition, they may be designated within a case in the role of Initial QA or Second Level QA, or Secondary Oversight (within CQI reviews only).

Depending on the type of OMS site, the OMS State Administrator role has slightly different capabilities:

- The OMS State Administrator for a **CFSR Review Site** (for states conducting their own case reviews) can manage users and sites.
- The OMS State Administrator for a **Training Site** can manage users, sites, and the PUR start date.
- The OMS State Administrator for a **CQI Review Site** can manage users, sites, and the PUR start date, and can de-identify finalized cases and interviews.

Observer. Users assigned the system role of Observer have read-only privileges within the OMS. Observers may view the read-only version of cases and view all reports.

C. Home Page

Once you have logged into the portal and accessed the OMS, you will be on the OMS home page. From here, you can select the review type and then choose to navigate to either the OSRI or SIG. If your only OMS role is Reviewer, you will only be able to navigate to the OSRI. If you only have access to CFSRs or to CQI reviews, but not both, you will see a screen similar to that in Figure 2A, below. If you have access to at least one CFSR and at least one CQI review, you will see a screen similar to the one in Figure 2B

Figure 2A: The Home Page (User With Access to Either a CFSR or a CQI Review)

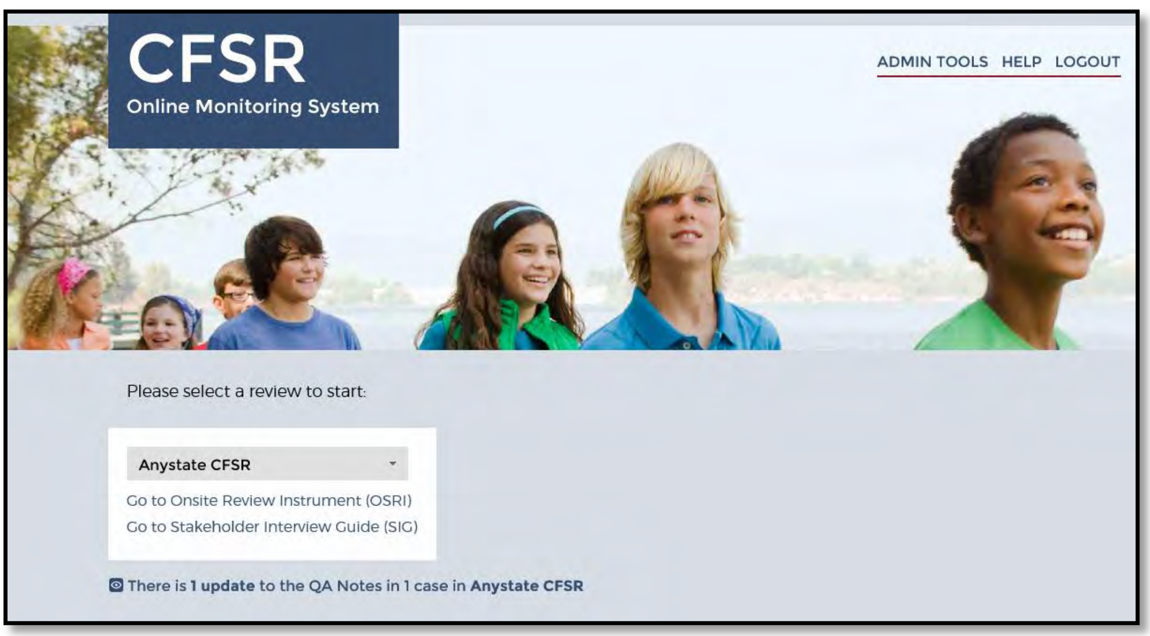
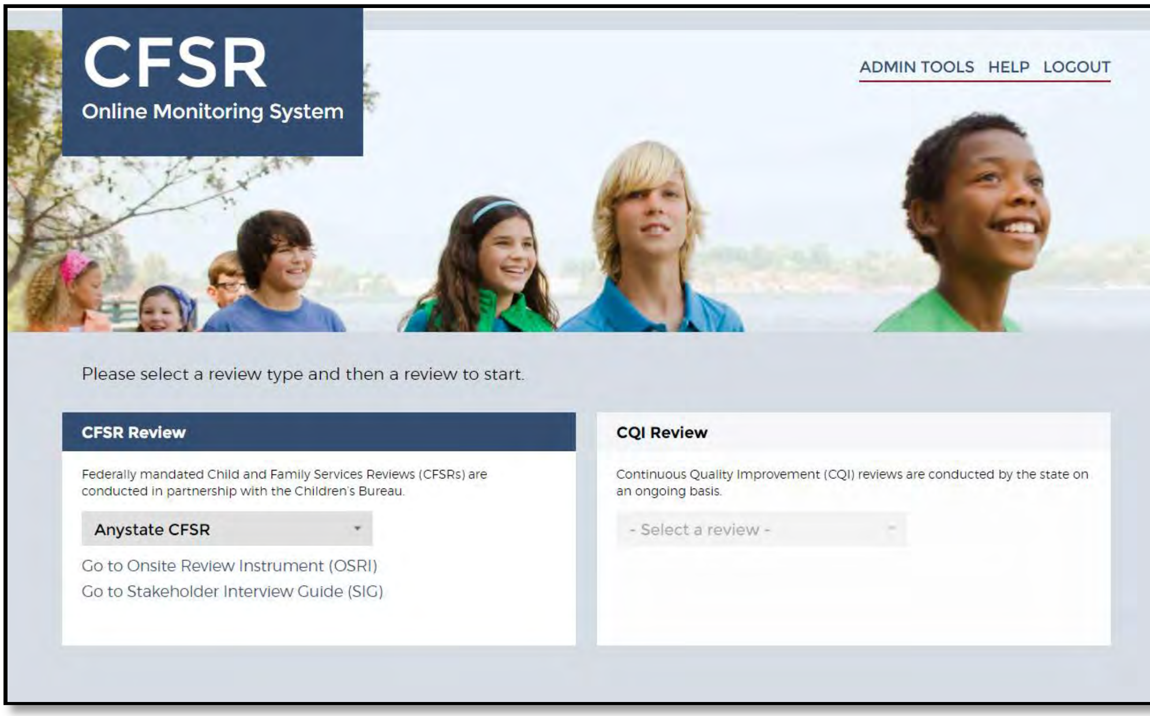


Figure 2B: The Home Page (User With Access to Both a CFSR and CQI Review)



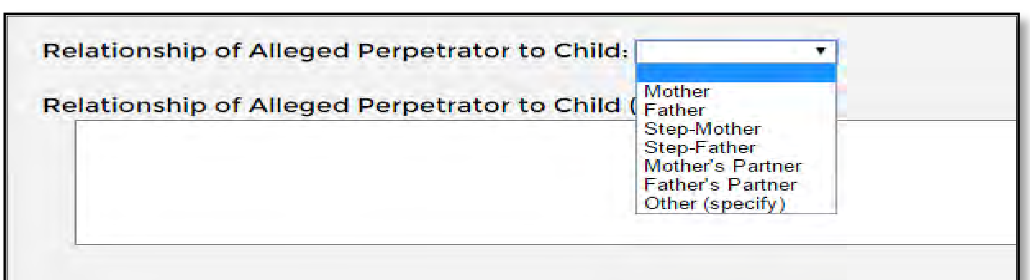
You must first click inside either the CFSR or the CQI box to enable the dropdown menu, and then you may select your desired review from it.

Section III: Data Entry

Questions found in the OMS OSRI and SIG use a variety of data entry formats. These formats include dropdown menus, checkboxes, date fields, narrative fields, prefilled fields, miscellaneous fillable fields, and tables.

> **Dropdown menus.** Dropdown menus provide a list of possible answers from which to choose. Select the desired answer from the list so that it fills the selection box. You must select an answer for each question, and you may only select one answer from the list. Be sure to select NA for questions that are not applicable.

Figure 3: Dropdown Menu in OSRI Item 1, Table A1

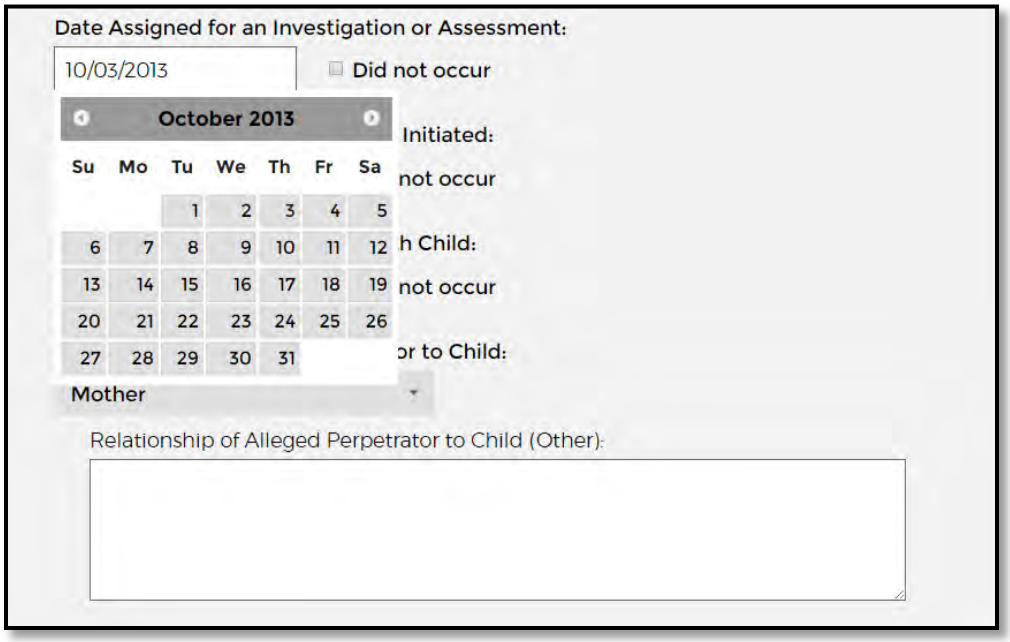


Checkboxes. For questions where more than one answer from a selection is possible, a list of answers with corresponding checkboxes will be listed below the question. Select one or more answers to complete the question.

Figure 4: Checkboxes in OSRI Item 1, Table A1

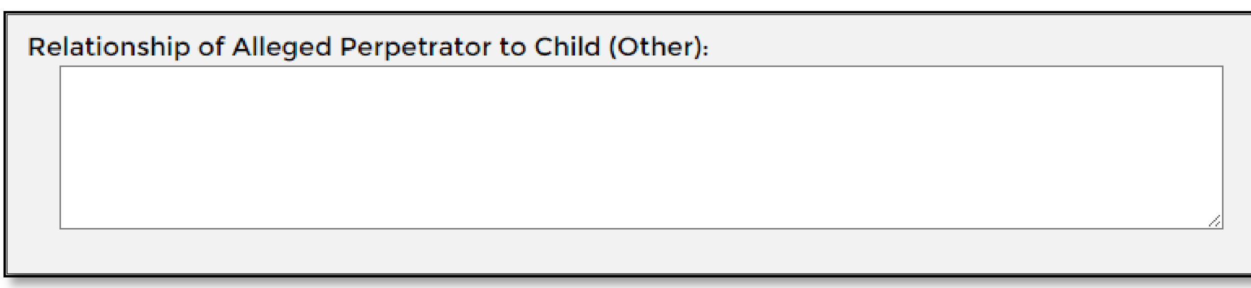
Date fields. Questions regarding a specific date will feature a blank date field. Click the cursor inside the field box to either type the answer (following the format MM/DD/YYYY and using leading zeros for months and days that are single digits), or simply select the date from the popup calendar that appears below the date field. Use the arrow icons on either side of the month to scroll to the appropriate month and year.

Figure 5: Date Field in OSRI Item 1, Table A1



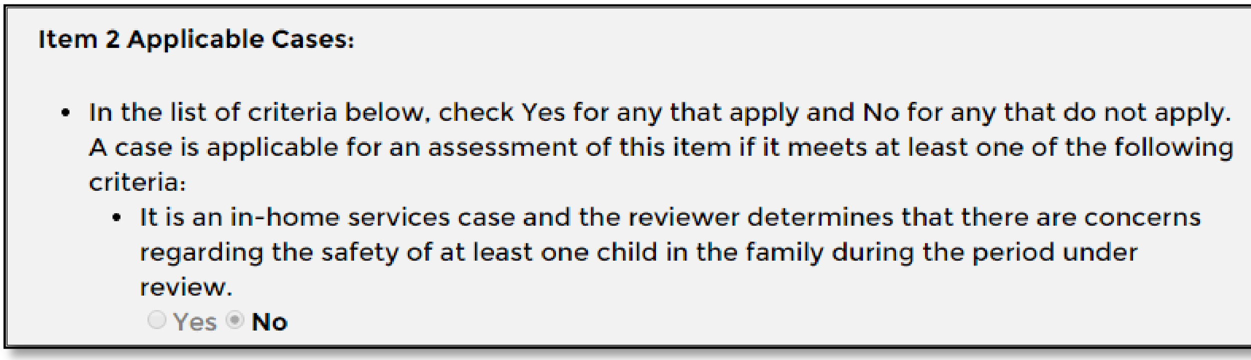
Narrative fields. Questions that require further explanation once a certain answer has been selected are followed by narrative fields. Place the cursor inside of the text field to enter your answer. You may also paste text into narrative fields that you have copied from another location. You may also go back and edit these fields. Narrative fields have varying maximum character lengths, and you will be notified upon saving an entry if it exceeds the limit. Remember not to use proper names in the narrative fields, as these would have to be removed before the case can be finalized.

Figure 6: Narrative Field in OSRI Item 1, Table A1



Prefilled fields. If a question's answer can be inferred from previous answers, the question will appear already answered and grayed out. Note that you cannot change a prefilled answer without going back through the instrument and changing the corresponding previous answer(s).

Figure 7: Prefilled Field on the Case Applicability Page of OSRI Item 2

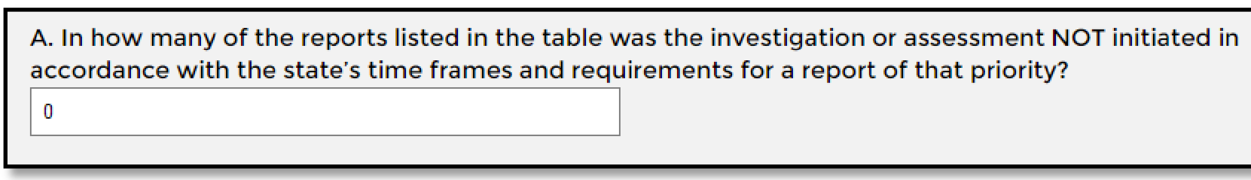

Item 2 Applicable Cases:

- In the list of criteria below, check Yes for any that apply and No for any that do not apply. A case is applicable for an assessment of this item if it meets at least one of the following criteria:
  - It is an in-home services case and the reviewer determines that there are concerns regarding the safety of at least one child in the family during the period under review.

    Yes **No**

Miscellaneous fillable fields. For questions that have a wide range of possible answers, especially those for which you have already indicated “Other,” type the answer in the corresponding empty text field. If you are unsure about your answer, remember to reference the question’s definition and instructions by selecting the “show” link. Fillable fields have varying maximum character lengths, and you will be notified upon saving an entry if it exceeds the limit.

Figure 8: Fillable Field in OSRI Item 1


A. In how many of the reports listed in the table was the investigation or assessment NOT initiated in accordance with the state’s time frames and requirements for a report of that priority?

0

Tables. Several tables can be found throughout the OSRI, including in the Face Sheet and in Items 1, 4, 5, 16, 17, and 18. Select the “plus” icon and corresponding text (e.g., Add Table A1 Entry) to add information to the table.

Figure 9: Reports Table in OSRI Item 1, Table A1

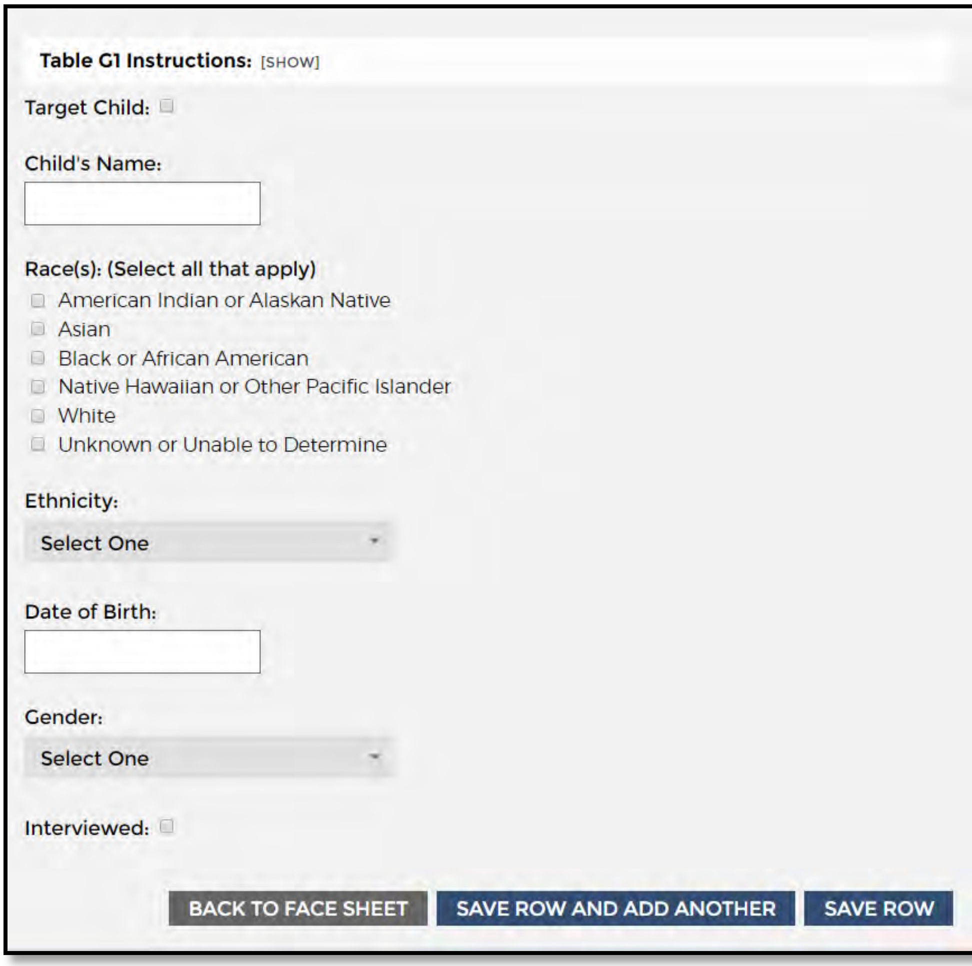
A1. Reports Table

Report Date	Name of Child	Allegation	Priority Level (if applicable)	Assessment or Investigation	Date Assigned for an Investigation or Assessment	Date Investigation or Assessment Initiated	Date of Face-to-Face Contact With Child	Relati of Alle Perpe to Chi
09/29/2014	John	Neglect (not including medical neglect), Medical neglect, Mental/physical health of child, Child's behavior		Investigation	09/30/2014	10/10/2014	10/30/2014	Step-F

ADD TABLE A1 ENTRY

You will be redirected to the question's table form on a separate page. Be sure to check all appropriate boxes and complete all fields before saving. Once the form is complete, you may select "Save Row" to save and return to the item page, select "Save Row and Add Another" to save and remain within the table form for additional entries, or select "Back to Item" to return to the previous page without saving the current row to the table. To edit existing information in a table, click on the blue link within the first column of the row you want to edit (e.g., the Report Dates in Figure 9 above).

Figure 10: G1. Face Sheet Child Table Form



Section IV: The OSRI

The OMS OSRI features eight different review roles—State Reviewer, State Site Leader, Federal Reviewer, Federal Site Leader, Consultant Reviewer, Consultant Site Leader, OMS State Administrator, and Observer—to manage the case review and Quality Assurance (QA) process. Each of these roles has specific functions and limited capabilities that clearly define each role's involvement in the process. The OMS State Administrator and Observer roles were described in section II above, Getting Started. Depending on your role and whether the review is being conducted as part of a CFSR or an ongoing CQI review, certain OMS functions and pages within the OMS OSRI will be accessible or restricted to you.

> **Reviewer.** Users assigned the system role of Reviewer (whether State, Federal, or Consultant Reviewer) are primarily responsible for creating a case, entering and editing case-related data, and submitting the case for review by QA staff. After submission to QA staff for review, Reviewers can only view the read-only version of the case. As with State, Federal, and Consultant Site Leaders, the Reviewer can also add and edit his or her own case QA Notes, eliminate a case, and view case-level reports.

State Site Leader. Users assigned the system role of State Site Leader have the privileges associated with Reviewers described above and may create a case, assigning themselves as the Reviewer on that case. In addition, they may be designated within a case in the role of Initial QA or Second Level QA, or Secondary Oversight (within CQI reviews only). In their QA role, State Site Leaders can eliminate cases; add and edit QA Notes; override case ratings; view the read-only version of a case; transfer the case back to data-entry mode; mark the case complete; finalize the case; and view case-level, review-level, and item-specific reports.

Consultant Site Leader. Users assigned the system role of Consultant Site Leader have the privileges associated with Reviewers and State Site Leaders described above. In addition, a Consultant Site Leader can take notes within the SIG.

Federal Site Leader. Users assigned the system role of Federal Site Leader have the privileges associated with Reviewers and State and Consultant Site Leaders described above. The Federal Site Leader, however, may be designated within a case in the role of Secondary Oversight in any type of review (including a CFSR). Federal Site Leaders, whether in the role of Initial QA, Second Level QA, or Secondary Oversight, share many of the same functions as State and Consultant Site Leaders, such as eliminating cases; adding and editing QA Notes; overriding case ratings; viewing the read-only version of a case; assigning QA roles; transferring the case back to data-entry mode; marking the case complete; finalizing a case; and viewing case-level, review-level, and item-specific reports.

Table 1-A: OSRI Functions and Case-Level Authorizations for CFSRs in the OMS

Functions	Reviewer Role	State Site Leader Role**	Federal Site Leader Role
Create a case	Yes	Yes (as case-level Reviewer)	Yes (as case-level Reviewer)
Access/edit Case Setup page	Any time before case is finalized	Any time before case is finalized	Any time before case is finalized
Assign as QA role within case	No	Any time before case is finalized	Any time before case is finalized
Assign as Secondary Oversight within case	No	No	Any time before case is finalized
View case read-only	While case status is *QA in Progress, Case Complete,* or *Approved and Final*	Always	Always
Access Help page	Yes	Yes	Yes
Access Reports page, download reports	Yes	Yes	Yes
Enter/edit data in case (for users with a role in the case)	Anytime while case status is *Not Started or In Progress*	Yes (as case-level Reviewer) No (as case-level QA staff*)	Yes (as case-level Reviewer) No (as case-level QA staff)
Submit case to QA (for users with a role in the case)	Yes	Yes (as case-level Reviewer) No (as case-level QA staff)	Yes (as case-level Reviewer) No (as case-level QA staff)
Add/edit QA Notes (for users with a role in the case)	Any time before case is finalized	Any time before case is finalized	Any time before case is finalized
Override rating (for users with a role in the case)	No	While case status is *QA in Progress* (as case-level QA staff)	While case status is *QA in Progress* (as case-level QA staff)
Eliminate case (for users with a role in the case)	Any time before case is finalized	Any time before case is finalized. Must Approve	Any time before case is finalized. Must Approve
Transfer back to data-entry mode (for users with a role in the case)	No	While case status is *QA in Progress* or *Case Complete* (as case-level QA staff)	While case status is *QA in Progress* or *Case Complete* (as case-level QA staff)
Finalize case (for users with a role in the case)	No	While case status is *QA in Progress* or *Case Complete* (as case-level QA staff)	While case status is *QA in Progress* or *Case Complete* (as case-level QA staff)

* QA staff includes Initial QA, Second Level QA, and Secondary Oversight.

** Consultant Site Leaders have the same functionality as State Site Leaders and can take notes in the SIG.

Table 1-B: OSRI Functions and Case-Level Authorizations for CQI Reviews

Functions	Reviewer Role	State Site Leader Role	Federal Site Leader Role *If Invited By State*
Create a case	Yes	Yes (as case-level Reviewer)	NA
Access/edit Case Setup page	Any time before case is finalized	Any time before case is finalized	Any time before case is finalized
Assign as QA role within case	No	Any time before case is finalized	Any time before case is finalized
Assign as Secondary Oversight within case	No	Any time before case is finalized	Any time before case is finalized
View case read-only	While case status is *QA in Progress, Case Complete,* or *Approved and Final*	Always	Always
Access Help page	Yes	Yes	Yes
Access Reports page, download reports	Yes	Yes	Yes
Enter/edit data in case (for users with a role in the case)	Anytime while case status is *Not Started* or *In Progress*	Yes (as case-level Reviewer) No (as case-level QA staff*)	NA
Submit case to QA (for users with a role in the case)	Yes	Yes (as case-level Reviewer) No (as case-level QA staff)	NA
Add/edit QA Notes (for users with a role in the case)	Any time before case is finalized	Any time before case finalized	Any time before case finalized
Override rating (for users with a role in the case)	No	While case status is *QA in Progress* (as case-level QA staff)	While case status is *QA in Progress* (as case-level QA staff)
Eliminate case (for users with a role in the case)	Any time before case is finalized	Any time before case is finalized. Must Approve	NA (Oversight approval not needed for elimination of cases in CQI reviews)
Transfer back to data-entry mode (for users with a role in the case)	No	While case status is *QA in Progress* or *Case Complete* (as case-level QA staff)	While case status is *QA in Progress* or *Case Complete* (as case-level QA staff)
Finalize case (for users with a role in the case)	No	While case status is *QA in Progress* or *Case Complete* (as case-level QA staff)	While case status is *QA in Progress* or *Case Complete* (as case-level QA staff)

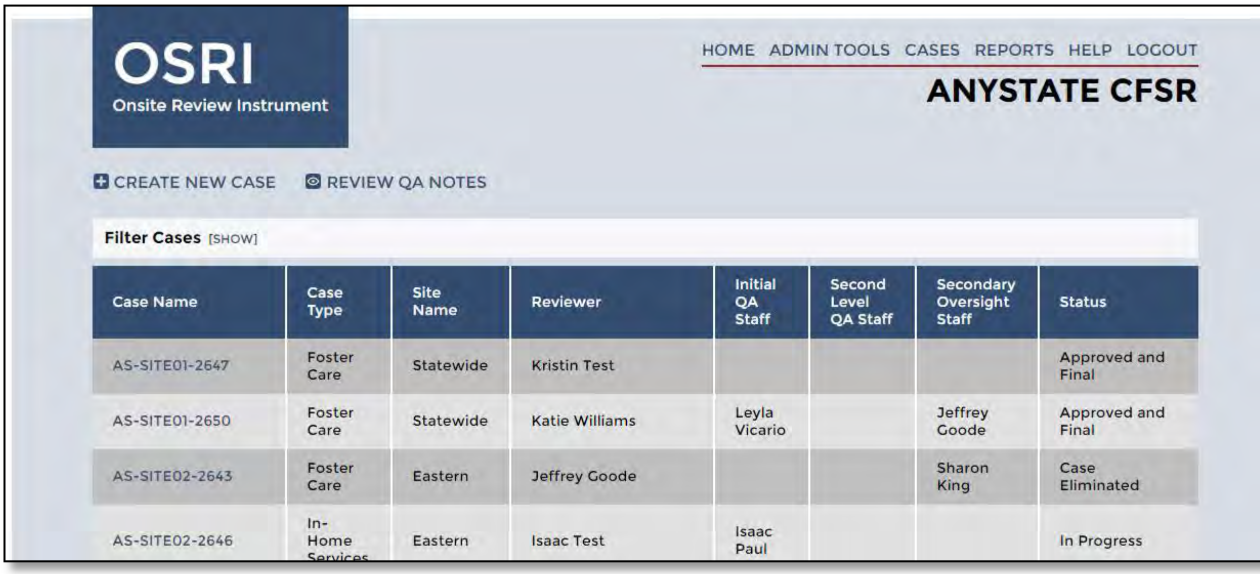
* QA staff means Initial QA, Second Level QA, and Secondary Oversight.

A. Reviewer

Dashboard

Access the OSRI dashboard by clicking “Cases” at the top of any given page. The OSRI dashboard is divided into three main components: the Create New Case option at the top, the search filters below that, and the list of existing cases in the main body of the page. Use the menu bar in the top right corner of the page to quickly navigate to other pages within the site, such as Home, Reports, and Help, or use the logout option at any time to leave the OMS.

Figure 11: The Dashboard Page



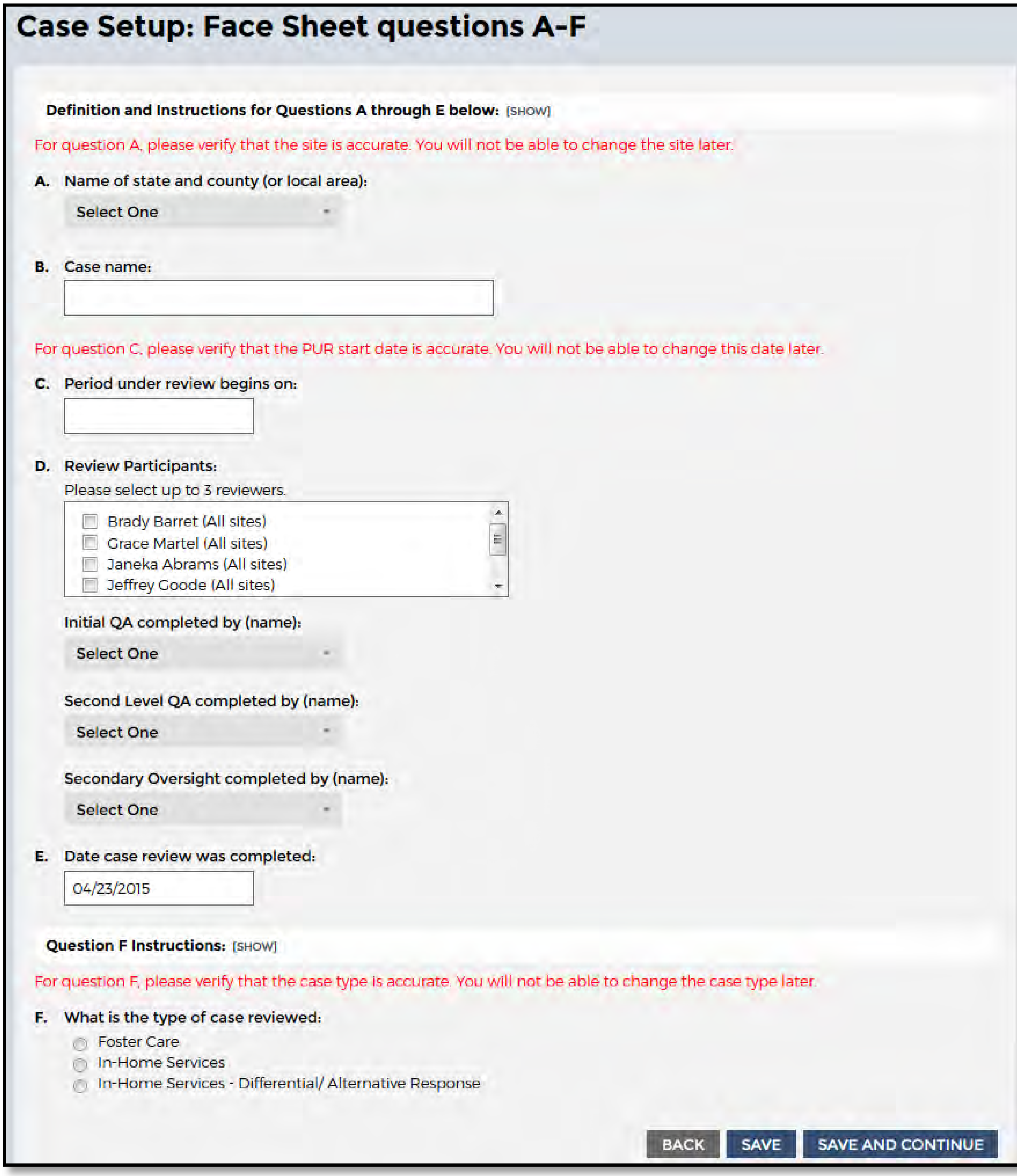
Using the OSRI dashboard page, you can create new cases or search, review, or modify existing cases.

Create a new case. To start a new case, simply select the “Create New Case” link at the top of the page. When you click the "Create New Case" button, a pop-up message will appear asking you to verify whether or not you are in the proper site (CQI or CFSR). The pop-up message only appears for users with access to both the CQI and CFSR sites for the same state. Once you have verified this information, complete the fields for the new case on the Case Setup page and select the “Save” or “Save and Continue” option at the bottom of the page to create the new case. As a Reviewer within a case, you can select up to three reviewers from the Reviewer(s) list. You may assign Initial QA, Second Level QA, or Secondary Oversight Staff at that time or revisit the Case Setup page to do so later. QA and Secondary Oversight staff may assign themselves to the case at a later time. Review the definitions and instructions for the form fields by selecting the “Show” link. Note: Under Question D, if a user tries to assign the same person to two or more roles (e.g., Reviewer, Initial QA, Second Level QA, or Secondary

Oversight), they will receive a logic message saying they may not assign a person to more than one role.

The PUR start date is filled in by the Reviewer at the individual case level, unless a request is made to have a fixed PUR pre-set for all cases within a review. Once the Case Setup questions are completed and saved, the new case will appear in the case list when you navigate back to the dashboard page. Select “Save and Continue” to continue directly to the Face Sheet.

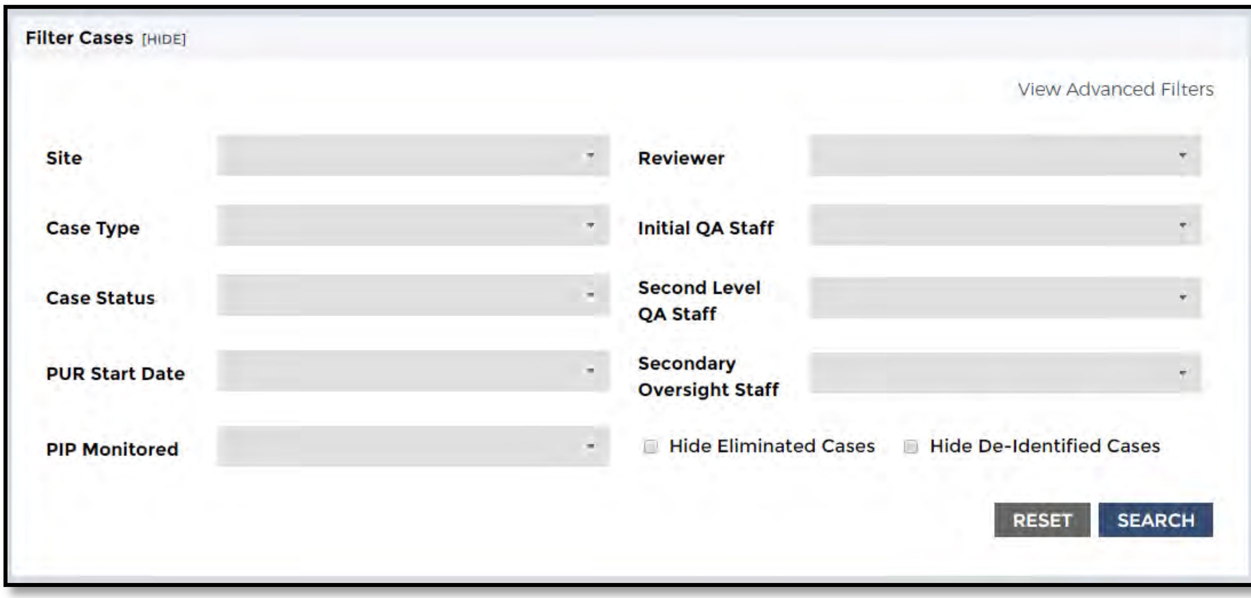
Figure 12: The OSRI Case Setup Page



Search for existing cases (basic filters). Select “Show” next to the Filter Cases text (see Figure 13, below) to reveal the “basic” case filter options. The dropdown menu filters that appear can be used to search for existing cases that you or other Reviewers have already created. Available dropdown filters include Site, Case Type, Case Status, PUR Start Date, Reviewer, Initial QA Staff, Second Level QA Staff, Secondary Oversight Staff, and PIP Monitored. Below the dropdown filters are two additional checkbox filters: Hide Eliminated Cases and Hide De-Identified Cases. Once you have selected the desired filters, select the “Search” option just under the filters and the relevant case(s) will appear in the case list below.

A maximum of 50 cases will display on the page at once; if your search results yield more than 50 cases, you will see links to subsequent page numbers just below the filters. You may click into page 2 of the case results to see cases 51-100, page 3 of the case results to see cases 101-150, and so forth. You may also use the “Reset” option to clear the filter fields and start the search process again. The OMS will remember the last filters that you applied when you leave the OSRI dashboard page (or log out of the OMS) and then return; if you no longer wish to use the same filters, click “Show” to reveal the filters, then either select different filters or use the “Reset” option.

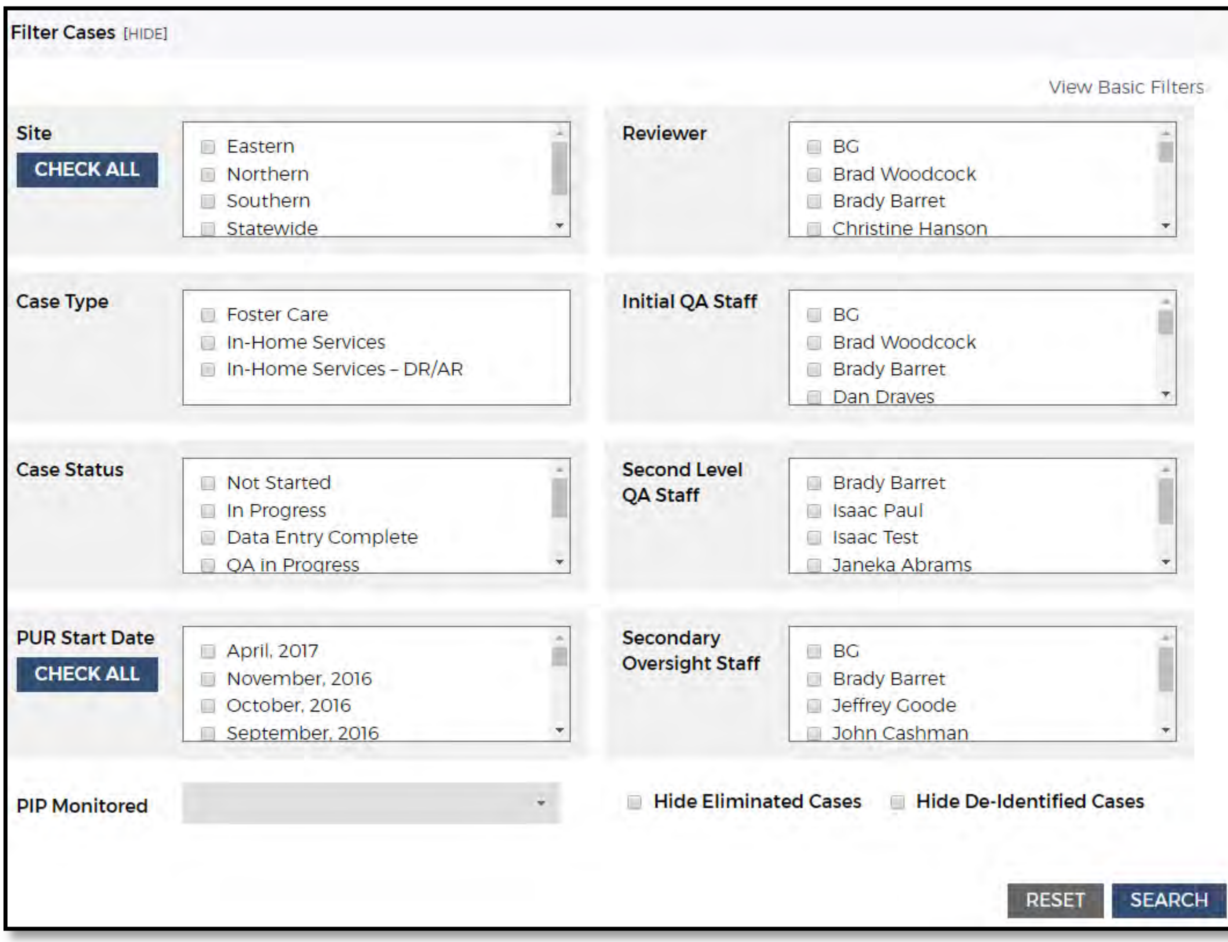
Figure 13: The OSRI Basic Case Filters Section



Search for existing cases (advanced filters). Select “Show” next to the Filter Cases text (see Figure 13, above) to reveal the “basic” case filter options. Then click “View Advanced Filters” in the upper right corner of the filters menu (see Figure 13, above). This will reveal the “advanced” case filter options. Whereas the “basic” dropdown filters allow you to select just one option per filter at a time, the “advanced” multi-select filters allow you to select multiple Sites, multiple Case Types, multiple Case Statuses, multiple PUR Start Dates, multiple Reviewers, and multiple QA Staff. Similar to the “basic” filters, there is a PIP Monitored dropdown filter and two additional checkbox filters below the multi-select filters: Hide Eliminated Cases and Hide De-Identified Cases. Once you have selected the desired filters, select the “Search” option just under the filters and the relevant case(s) will appear in the case list below.

Similar to the “basic” filter results, a maximum of 50 cases will display on the page at once; if your search results yield more than 50 cases, you will see links to subsequent page numbers just below the filters. You may click into page 2 of the case results to see cases 51-100, page 3 of the case results to see cases 101-150, and so forth. You may also use the “Reset” option to clear the filter fields and start the search process again. The OMS will remember the last filters that you applied when you leave the OSRI dashboard page (or log out of the OMS) and then return; if you no longer wish to use the same filters, click “Show” to reveal the filters, then either select different filters or use the “Reset” option.

Figure 14: The OSRI Advanced Case Filters Section



Review or modify existing cases. Scroll down the OSRI dashboard (see Figure 11, above) to find a list of existing cases within your state. Each case row includes general information about the case, including the case name, type, site, Reviewers, Initial QA Staff, Second Level QA Staff, Secondary Oversight Staff, and case status (e.g., Not Started, In Progress, Data Entry Complete, QA in Progress, Case Complete, Approved and Final, Case Eliminated). To modify this and other general case information for a specific case, click the case name and then click “Case Setup” located in the upper right corner of the case’s Case Overview page. Three fields on the Case Setup page cannot be changed after the case is created: site name, PUR start date, and type of case.

You can click “Cases” at any time to access the OSRI dashboard and, as mentioned, simply click the case name in the first column of the dashboard to open an existing case.

Case Overview Page

The Case Overview page (see Figure 15, below), accessible at the top of the navigation panel on the left, provides an outline of the OSRI for the selected case and enables you to navigate easily through the instrument. The page is divided into three main sections:

Case information bar. The case information bar at the top of the page provides general information about the case, including the case name, case type, case status, period under review, as well as the Reviewers, QA, and Secondary Oversight staff. The case information bar appears at the top of every page within the OSRI for easy reference.

Case Overview. The main body of this page includes the Face Sheet, OSRI Section, outcomes, and items. Options featured at the top of the page enable you to edit the case setup or eliminate the case entirely. The case status (e.g., Not Started, In Progress, QA in Progress) and rating of each outcome and item can be found to the right of the outcome or item’s description and is a useful point of reference for determining your progress. Note that each item’s status within a given outcome must show as Completed before the corresponding outcome rating will generate.

Navigation panel. The navigation panel on the left side of the page can be used to navigate to the OSRI Face Sheet, the item applicability pages, the item questions themselves, and each item rating page. As with the main body of the overview page, the outcomes and items are listed in order. Hovering the mouse over an item will prompt a popup box indicating the outcome’s or item’s focus. You can view the applicability questions associated with each item by selecting the item number, after which the corresponding questions and rating links will appear below the item text in a blue box. Use the table, question, and rating links that appear under each item to navigate within each item’s sections.

Figure 15: The Case Overview Page

Face Sheet

The Face Sheet page enables you to enter information about the case and the child(ren) and participants involved. Start by completing the Child Table. Select the “Add child to table” option to access the table form. For foster care cases, make sure to check the “Target Child” box at the top of the form for the appropriate child. Select the “Add another child to table” option for cases with multiple children. Next, complete the Case Participant Table by selecting “Add participant to table” and completing the table form. Select the “Save Row and Add Another” option for cases with multiple participants. After completing all of the questions on the Face Sheet, select “Save and Continue” to progress to the next page. Remember that the Child’s Name and Participant’s Name fields in these two tables are the only locations throughout the entire OSRI where proper names should be entered.

Figure 16: The Face Sheet Page

Face Sheet

Case Information

A. Name of state and county (or local area): Anystate - Eastern

B. Case name: John Doe

C. Period under review begins on: Apr 01, 2011

D. Reviewer(s): Brady Barret
Initial QA completed by: Jeffrey Goode
Second Level QA completed by: Leyla Vicario
Secondary Oversight completed by: Rachel Huerta

E. Date case review was completed: Apr 06, 2015

F. What is the type of case reviewed: Foster Care

G1. Child Table

	Target Child	Child's Name	Race	Ethnicity	DOB	Age	Gender	Interviewed	
1.	X	John	White	Non-hispanic	12/25/2007	7 yrs 3 mos	M	X	Delete
2.		Jeffrey	White	Non-hispanic	03/15/2009	6 yrs 0 mos	M	X	Delete

ADD ANOTHER CHILD TO TABLE

G2. Case Participant Table

	Participant's Name	Participant's Role	Relationship to Child	Interviewed	
1.	Jane	Mother	Biological mother	X	Delete
2.	Henry	Father	Stepfather		Delete

ADD ANOTHER PARTICIPANT TO TABLE

Question H Instructions: [SHOW]

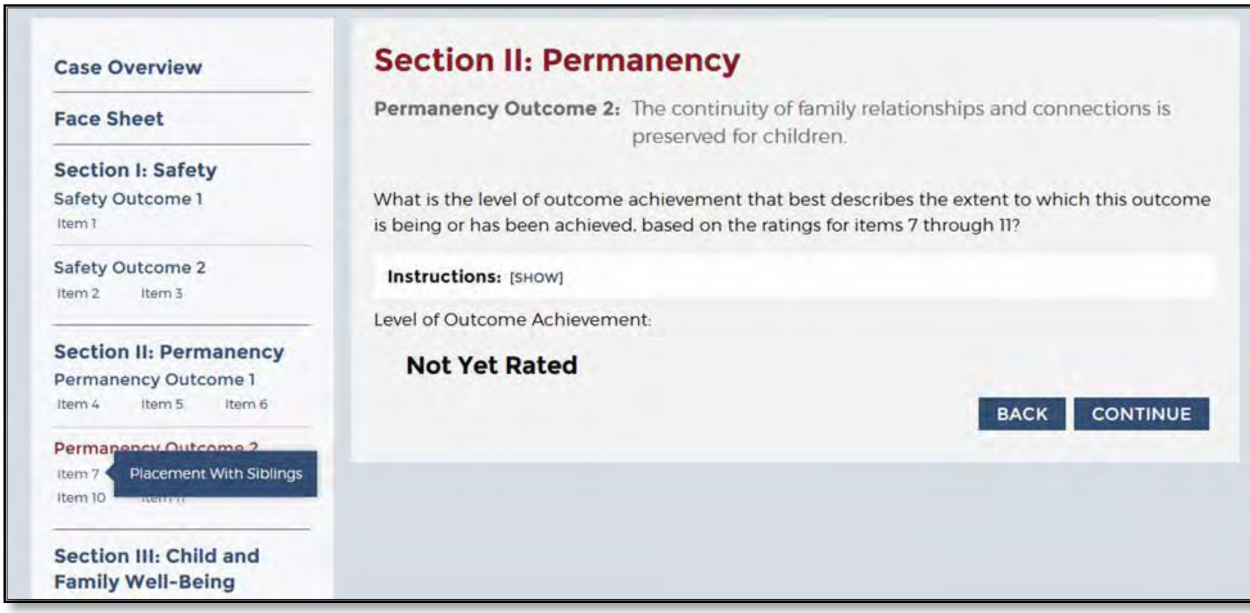
H. Was this case opened for reasons other than child abuse and neglect?

Yes **No**

Items

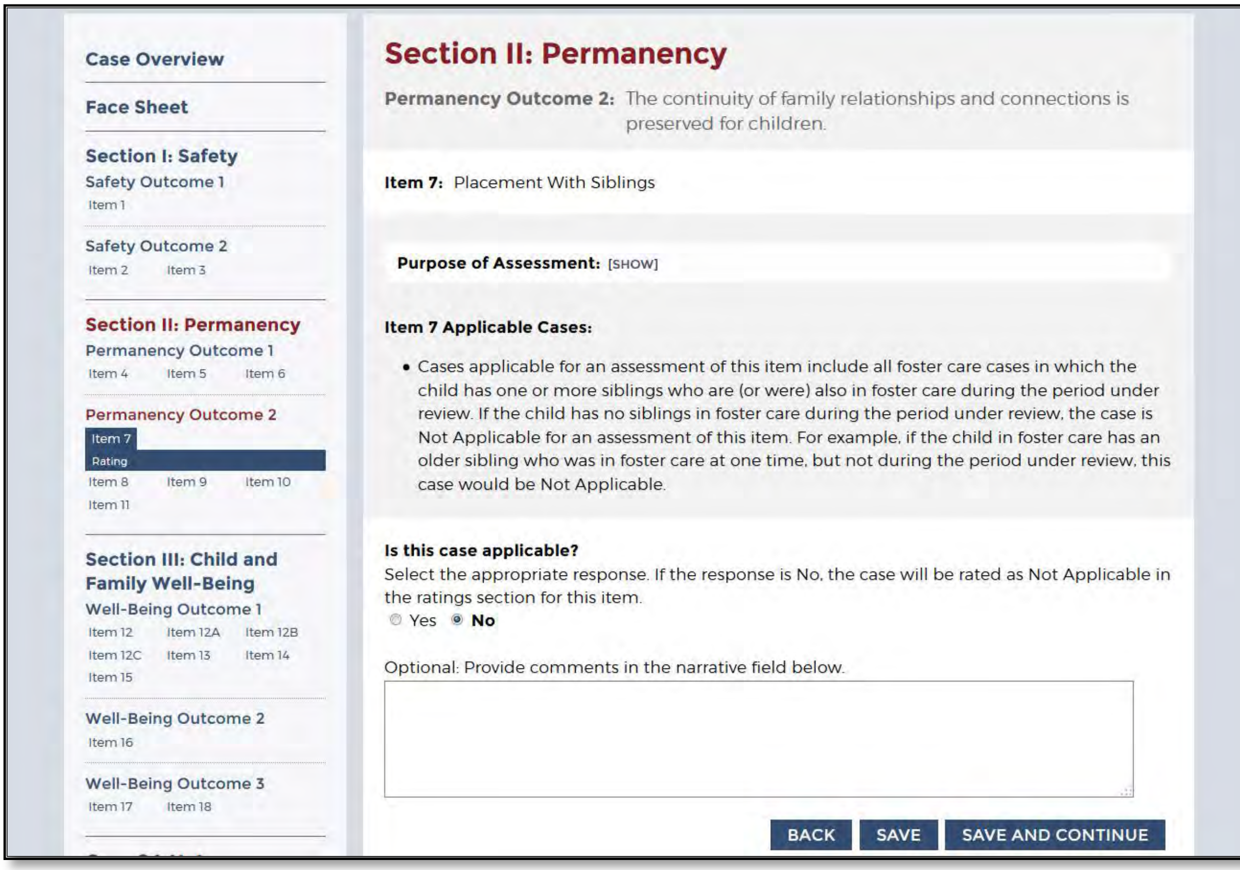
To begin completing an OSRI item from the Case Overview page, select the item number from the navigation panel on the left or from the Case Overview section (see Figure 17 below).

Figure 17: Selection of OSRI Item 7 From the Navigation Panel



The first page of the item (see Figure 18, below) provides information about the item's purpose and the criteria the case must meet for the item to be applicable. After reading the case applicability criteria (and clicking "Show" for any Purpose of Assessment or Definitions that you may find helpful), select whether or not the case is applicable, and save. If a case is not applicable, you will automatically be redirected to the next item.

Figure 18: Case Applicability Page of OSRI Item 7

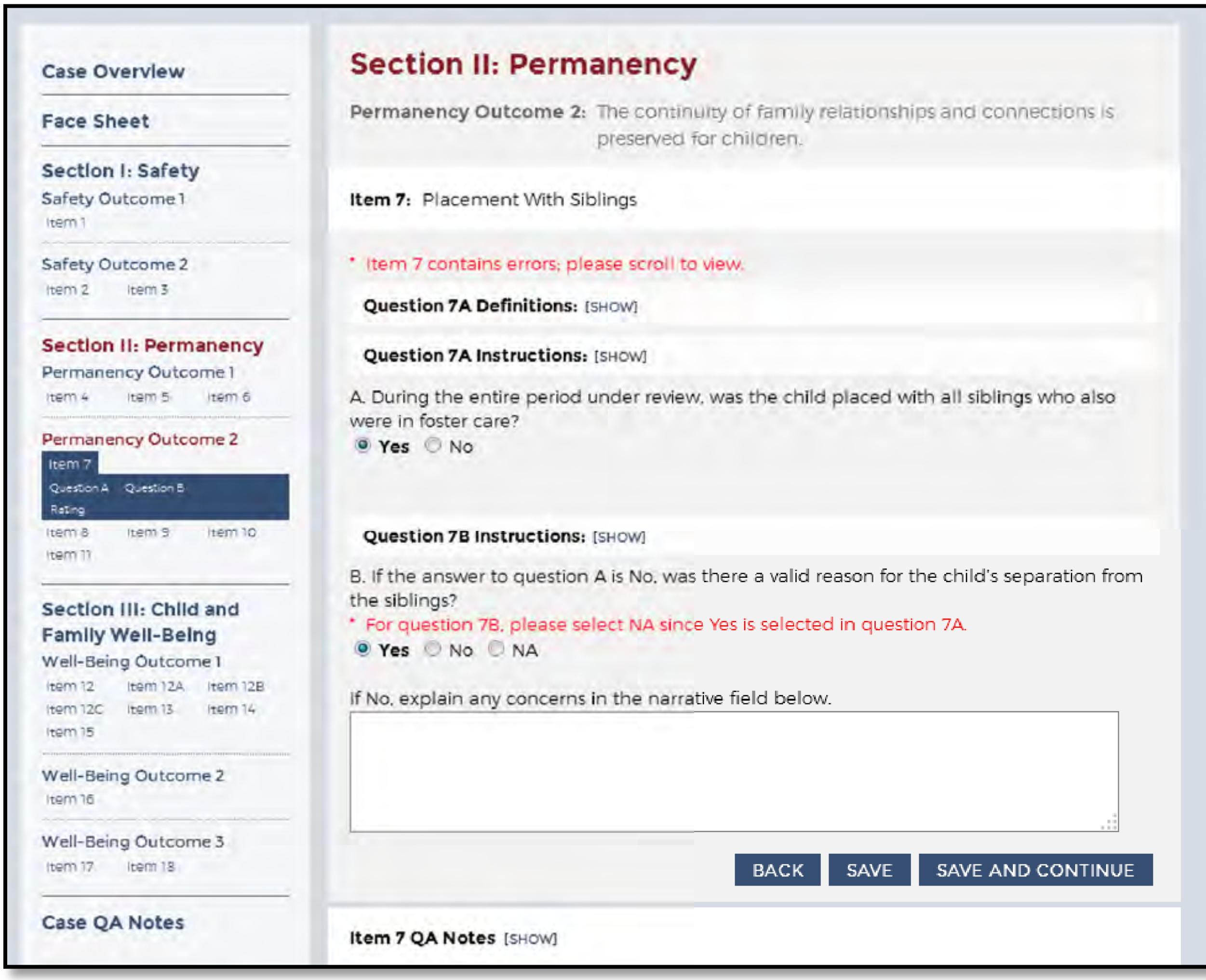


Once the case applicability question has been answered Yes or No and saved, the item questions will appear highlighted in a blue box below the item number in the navigation panel on the left of the screen. After reading the item's purpose and instructions, answer the questions within the item.

Logic Error Messages

If a question has not been answered, was answered incorrectly (e.g., a corresponding answer field was not completed), or the answer provided contradicts a previous answer, red text describing the question error(s) will appear both at the top of the page and above the question that must be addressed. You will not be able to save your answers and continue until the described errors have first been addressed. Whenever possible, resolve logic error messages and resave a page before moving on.

Figure 19: Example of Question Errors for OSRI Item 7



Disabled Items

Some OSRI outcomes and items may be automatically disabled in the OMS because they are not applicable to a certain type of case. For example, when completing an in-home services case, Permanency Outcomes 1 and 2 are automatically disabled because these outcomes are not applicable to in-home services cases. Disabled outcomes and items are indicated by gray and black text within the Case Overview section. In addition, disabled outcomes and items appear in gray text within the navigation panel. Hovering the mouse over these will prompt a popup box indicating that the outcome or item has been disabled (see Figure 20, below).

Figure 20: Message That Permanency Outcome 1 Has Been Disabled for This Case

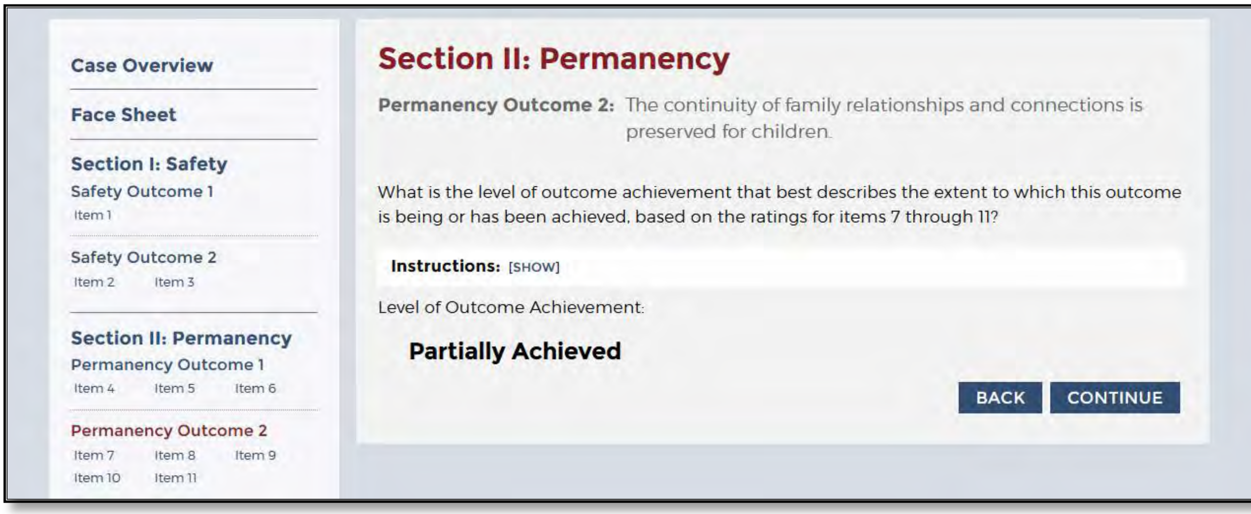
Item Ratings

The OSRI item ratings are automatically generated based on the answers saved within a given item. After completing all questions within an item, click “Save and Continue” to move to the item rating page where the item rating is displayed. The rating criteria for an item can also be viewed by clicking “Show” at the top of each item rating page. Use the Case Overview page to view all item ratings at once (see Figure 20, above).

Outcomes

The OSRI outcome ratings are dependent on the completion and rating of the related item(s) and are generated automatically by the OMS logic. The OSRI outcome rating pages can be accessed from either the navigation panel on the left or from the Case Overview page. Select the outcome name and number to navigate to the desired outcome rating page. Outcome rating pages feature information regarding the outcome’s purpose, rating instructions, and level of outcome achievement (i.e., rating) if the outcome’s item(s) have already been completed. If an outcome shows as Not Yet Rated, then not all of the items within it have been completed or marked as Not Applicable. The outcome rating can also be viewed on the Case Overview page.

Figure 21: Permanency Outcome 2 Page



Note that you cannot change the outcome rating from the outcome page. If you disagree with an outcome rating, revisit the outcome rating criteria and determine whether all items within that outcome have been answered appropriately. If you believe that all items within an outcome have been answered appropriately and you still disagree with the rating, see the following section for information about leaving a QA Note for your QA staff that explains your concern.

Quality Assurance

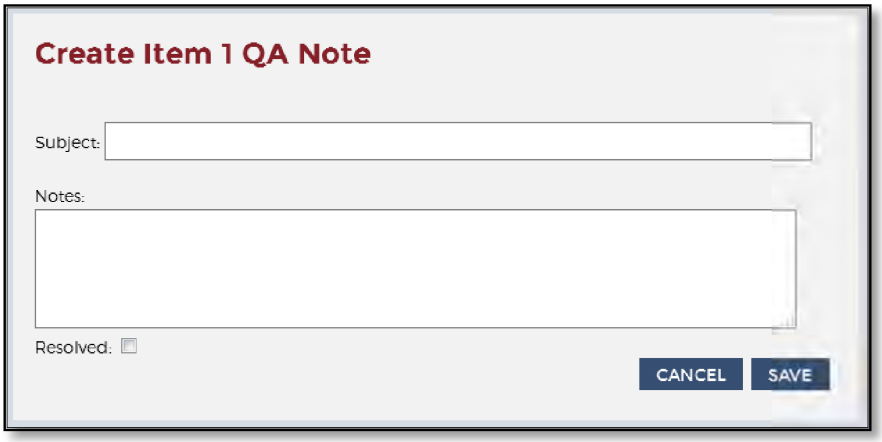
QA functionality was designed with the Children's Bureau process in mind (see the OSRI Quality Assurance Guide at http://www.acf.hhs.gov/sites/default/files/cb/round3_qa_guide.pdf), but it is flexible enough to accommodate any state's QA processes as well. QA Notes provide a way for Reviewers and QA staff to communicate within each case because the notes are used to question, explain, and justify answers and ratings. Reviewers can create QA Notes to flag an issue for QA staff or explain responses during QA. QA Notes can be reviewed by any individual assigned to that case in the role of Reviewer, QA staff, or Secondary Oversight, as well as by those with the role of Observer. Individuals can modify and delete their own QA Notes.

While most comments that a Reviewer provides in a case should be added within a question narrative or within the comment section on each item rating page, Reviewers might sometimes create a QA Note with a question or explanation for their QA staff to consider. More often than not, though, a Reviewer simply posts a QA Note in response to a QA Note left for the Reviewer by QA staff.

The following explains how to create, view or edit, delete, respond to, and filter a QA Note.

> **Create a new QA Note.** Each page within an item features a QA Notes option at the bottom of the page. To add a new QA Note, select "Show" next to the QA Notes text at the bottom of any item page, click "Create New QA Note", type the subject and note within the text boxes, and then click "Save".

Figure 22: QA Notes Section for OSRI Item 1



View or edit a QA Note. To view a QA Note, select "Show" next to the QA Notes text at the bottom of any item page. To edit a case note you created, click the "Edit" link (under the date the QA Note was made). Reviewers can also view all QA Notes in the case by selecting "Case QA Notes" at the top of the navigation panel on the left and then navigating into a specific QA Note by selecting the item for which the QA Note was made. Within this Case QA Notes page, Reviewers have the option to "Create New QA Note," which is a case-level QA Note rather than an item-level QA Note previously discussed.

Figure 23: OSRI Item-Level QA Note

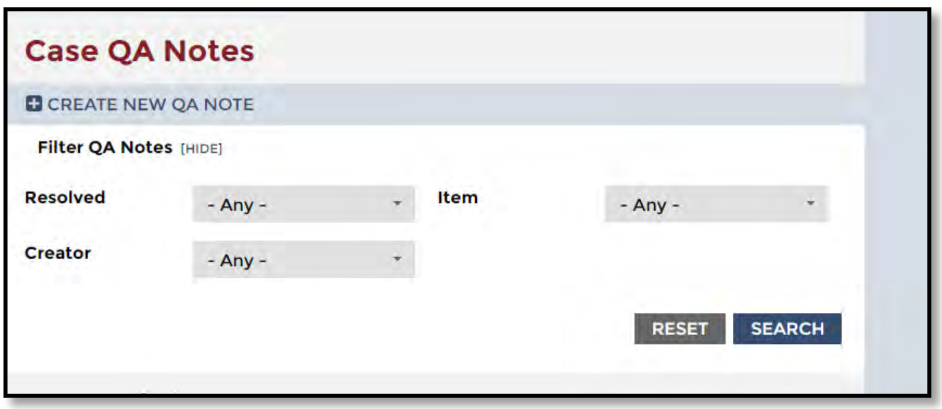
Once the QA Note is open, Reviewers can edit the subject or note in the text boxes and then select "Save" below. Reviewers can also select the "Resolved" checkbox and then save to indicate that a QA Note has been closed. Resolving QA Notes is an optional tracking feature and is not required to finalize a case.

Delete a QA Note. To delete a QA Note, select "Case QA Notes" at the top of the navigation panel on the left and then select the "Delete" option (under the date the QA Note was made). Confirm the deletion by selecting "OK." QA Notes are usually only deleted if the note was created in error. Do not delete a QA Note after it has been resolved, unless the intent is to permanently remove the QA Note from the case.

Respond to a QA Note. To respond to a QA Note, select “Case QA Notes” at the top of the navigation panel on the left, click “Show” to the right of “Responses”, and then select “Respond To QA Note” within the desired QA Note.

Filter a QA Note. To locate a specific QA Note, use the "Filter QA Note" feature. On the "Case QA Notes" page, click "Show" to right of "Filter QA Notes". Select from among three filter options: Resolved, Creator, and Item.

Figure 24: Filter QA Notes



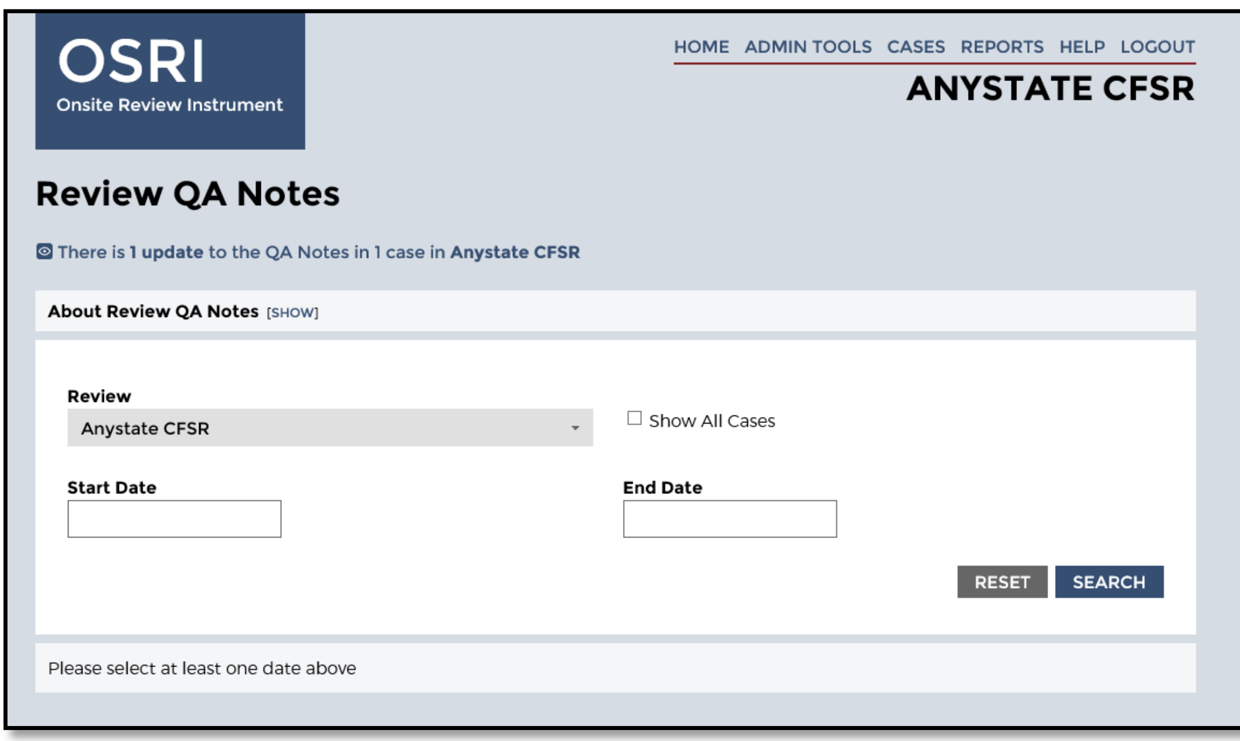
QA Notes Notifications

When a user is assigned to a case and that case contains QA Notes, the user will see a notification link on the OMS Home Page when a new or updated note appears since the last time they logged into the OMS. The link will appear below the review selection dropdown box.

Figure 25: QA Notes Notification on OMS Home Page

Clicking this link brings the user to a new page, the Review QA Notes page.

Figure 26: Review QA Notes Page



On the Review QA Notes page, the user may:

1. **View QA Notes for a particular review and/or for particular cases on a review** to which they are assigned. The notes will appear in the following order:

    a. Most recent note or update to a note.
    b. Remaining notes in reverse chronological order (from most recent to least recent) based on next most recent update.
    c. All sub-notes will be nested chronologically under the main note.

    Note: an “update” might include a new note, an edited note, a response to a QA Note, deleting a response, a change from Unresolved to Resolved, or change back from Resolved to Unresolved.

2. **Use the search field at the top of the page.** The field allows users to enter a beginning and end date to limit their search. If a user knows they are looking for a QA Note from last week, they can enter/adjust the date or date range and conduct their search.

3. **Select a different review and display QA Notes from that review**. If a user is assigned to multiple reviews, this feature allows them to jump from review to review.

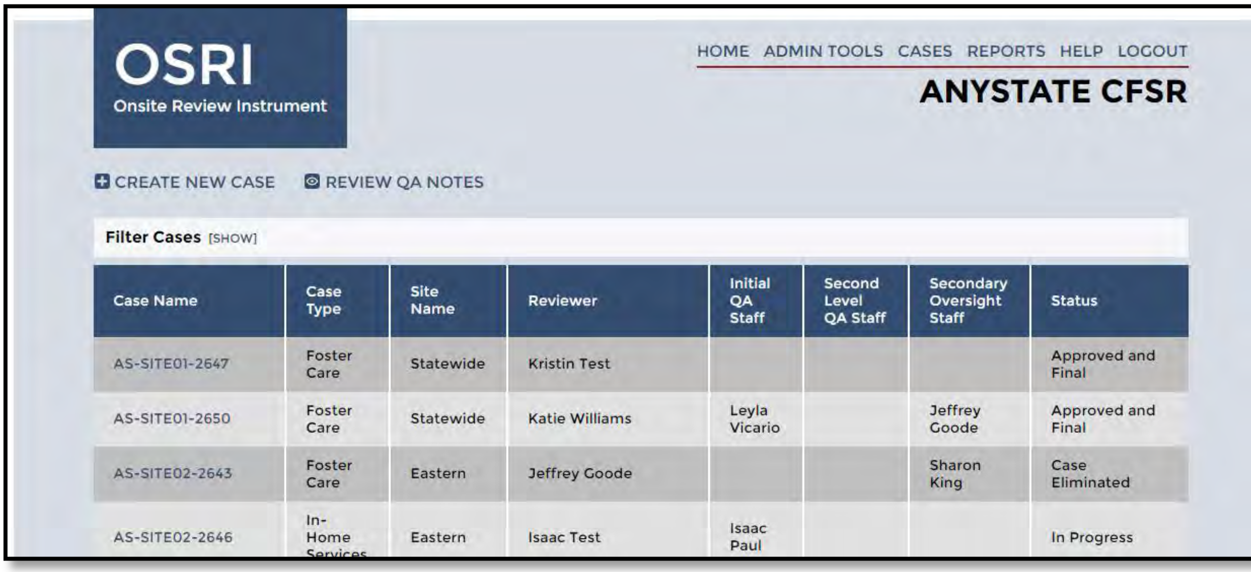
4. **Enter a case or an Item from the QA Note**. For Case Notes, a user may enter a particular case by clicking on the Case Name, which will bring them to the Case Overview page. For Item Notes, a user may either click the Case Name to get to the Case Overview page or enter the item directly by clicking the Item link.

5. **Filter to show notes from all cases across the review**. For all user roles except Reviewers, the “Show All Cases” check box allows for the display of all QA Notes for all cases in a review (rather than from just the cases the user is assigned).

Users may view a detailed explanation of the QA Notes Notification feature at the top of the Review QA Notes page in the [Show/Hide] box adjacent to the About Review QA Notes header.

In addition to the link from the OMS Home Page, users may access the Review QA Notes from a link on the OSRI Cases page. It appears adjacent to the Create New Case towards the top left.

Figure 27: Review QA Notes link on OSRI Cases Page



Case Name	Case Type	Site Name	Reviewer	Initial QA Staff	Second Level QA Staff	Secondary Oversight Staff	Status
AS-SITE01-2647	Foster Care	Statewide	Kristin Test				Approved and Final
AS-SITE01-2650	Foster Care	Statewide	Katie Williams	Leyla Vicario		Jeffrey Goode	Approved and Final
AS-SITE02-2643	Foster Care	Eastern	Jeffrey Goode			Sharon King	Case Eliminated
AS-SITE02-2646	In-Home Services	Eastern	Isaac Test	Isaac Paul			In Progress

Submitting a Case for QA

When a Reviewer has finished answering all questions and confirms that all item and outcome ratings have been generated (on the Case Overview page), a “Submit for QA” link appears in the upper right corner of the Case Overview page. If you do not see the “Submit for QA” link, it is likely that an item status on the page is still listed as Not Started or In Progress.

Figure 28: Case Overview Page With Submit for QA Link

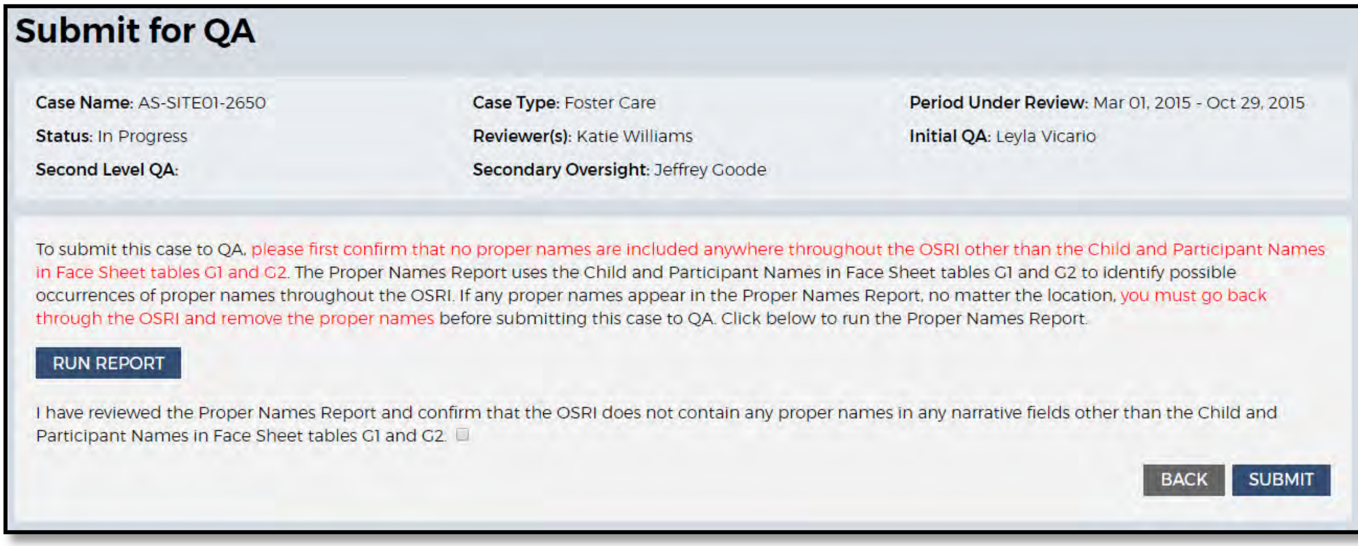
Click “Submit for QA,” and the OMS automatically verifies that the case passes all of the built-in logic. Although saving each page during data entry will display any logic issues on that given page, this final full-case validation ensures that all items and pages pass the logic requirements in relation to each other and that more recent items and answers pose no logic issues for the items and answers saved earlier.

If any logic issues remain, a red text error message will display on the Case Overview page: “The submission was unsuccessful. Please review the status of each item below and revisit those items that are not complete and rated.” The item status will have reverted to In Progress for those items that need resolution.

Once all items have been corrected and are again Complete and rated, the “Submit for QA” link will reappear in the upper right corner of the Case Overview page. Click “Submit for QA” to rerun the full-case validation, and if the submission was successful, you will be taken to a new page entitled Submit for QA.

The Submit for QA page requires you to first confirm that no proper names are included anywhere throughout the OSRI other than the Child and Participant Names in Face Sheet tables G1 and G2. You can run and review the Proper Names Report, which uses the Child and Participant Names in Face Sheet tables G1 and G2 to identify possible occurrences of proper names throughout the narrative fields of the OSRI.

Figure 29: Submit for QA Page



Click "Run Report" to run the Proper Names Report and review possible occurrences of proper names. If any proper names appear in the Proper Names Report, you must click each location to go back through the OSRI and remove the proper names before submitting this case to QA. You may export this report to PDF or Excel. If no proper names appear in the Proper Names Report, click "Back to Submit for QA" to return to the Submit for QA page.

From the Submit for QA page, you may click "Back" to return to the Case Overview page, or check the box to certify that the OSRI does not contain proper names in any narrative fields throughout the OSRI, and click "Submit."

You will now see a confirmation on the Case Overview page that reads "The case status is now Data Entry Complete" or "The case status is now QA in Progress." The case is now ready for QA and will show its case status as Data Entry Complete (if no one is assigned to any of the QA roles), or as QA in Progress (if a user has already been assigned to one of the QA roles).

B. State, Federal, and Consultant Site Leaders Acting in the Role of QA

Dashboard

Access the OSRI dashboard by clicking "Cases" at the top of any given page. The OSRI dashboard is divided into three main components: the Create New Case option at the top, the search filters below that, and the list of existing cases in the main body of the page. Use the menu bar in the top right corner of the page to quickly navigate to other pages within the site, including the Home, Reports, and Help pages, or use the logout option at any time to leave the OMS.

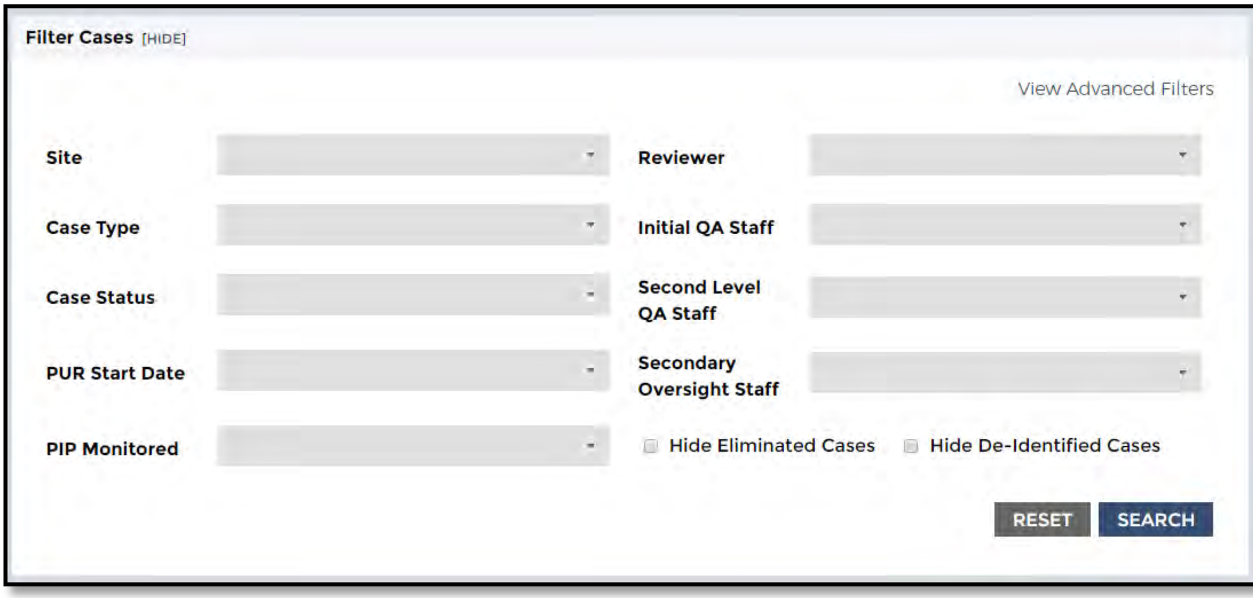
Figure 30: The OSRI Dashboard Page

Using the OSRI dashboard page, you can search or review existing cases.

Search for existing cases (basic filters). Select "Show" next to the "Filter Cases" text (see Figure 30, above) to reveal the "basic" case filter options. The dropdown menu filters that appear can be used to search for existing cases that Reviewers have already created or to search directly for cases to which you have been assigned. Available dropdown filters include Site, Case Type, Case Status, PUR Start Date, Reviewer, Initial QA Staff, Second Level QA Staff, Secondary Oversight Staff, and PIP Monitored. Below the dropdown filters are two additional checkbox filters: Hide Eliminated Cases and Hide De-Identified Cases. Once you have selected the desired filters, select the "Search" option just under the filters and the relevant case(s) will appear in the case list below.

A maximum of 50 cases will display on the page at once; if your search results yield more than 50 cases, you will see links to subsequent page numbers appear just below the filters. You may click into page 2 of the case results to see cases 51-100, page 3 of the case results to see cases 101-150, and so forth. You may also use the "Reset" option to clear the filter fields and start the search process again. The OMS will remember the last filters that you applied when you leave the OSRI dashboard page (or log out of the OMS) and then return; if you no longer wish to use the same filters, click "Show" to reveal the filters then either select different filters or use the "Reset" option.

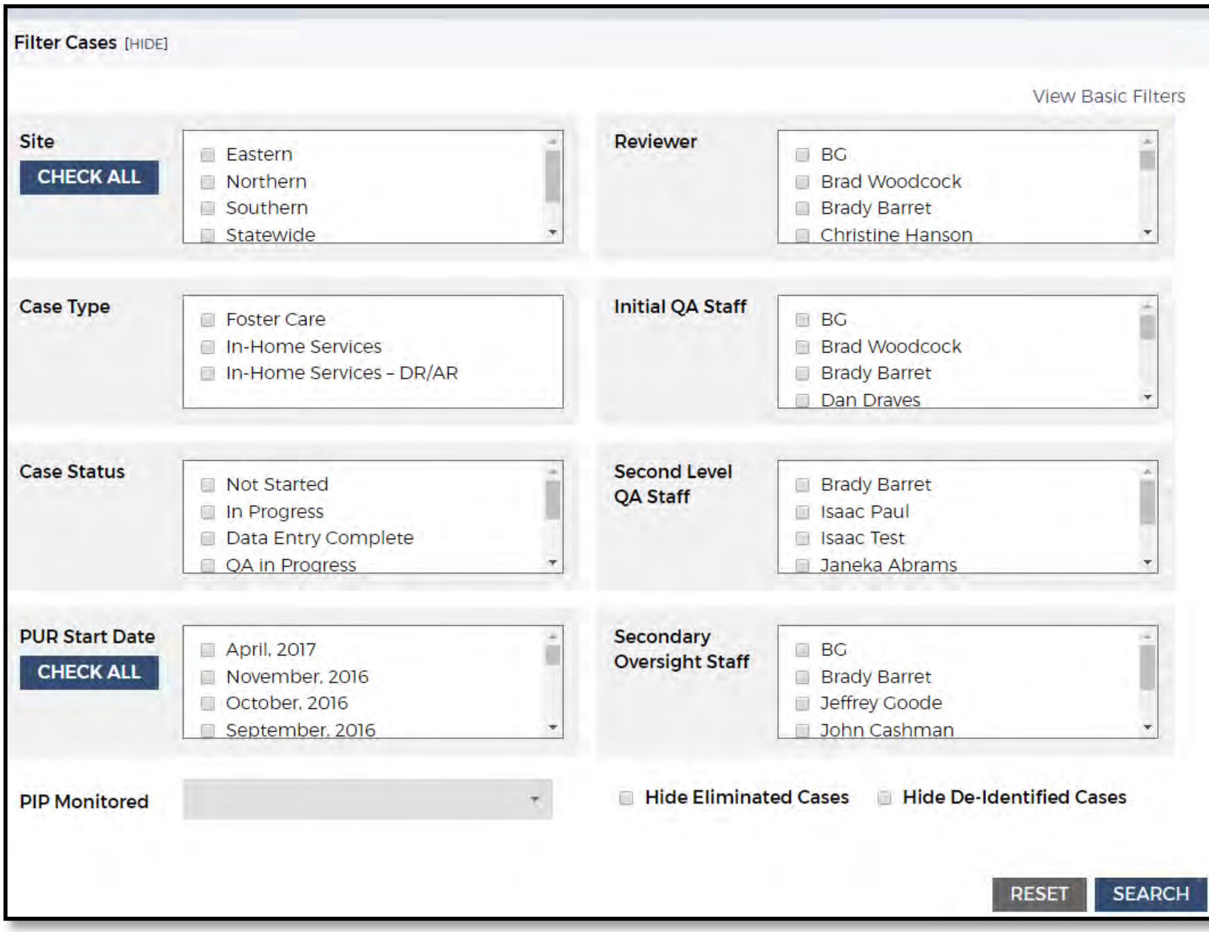
Figure 31: The OSRI Basic Case Filters Section



Search for existing cases (advanced filters). Select “Show” next to the Filter Cases text (see Figure 30, above) to reveal the “basic” case filter options. Then click “View Advanced Filters” in the upper right corner of the filters menu (see Figure 31, above). This will reveal the “advanced” case filter options. The advanced filters are the same as the “basic” filters except each filter can have multiple selections. Whereas the “basic” dropdown filters allow you to select just one option per filter at a time, the “advanced” multi-select filters allow you to select multiple Sites, multiple Case Types, multiple Case Statuses, multiple PUR Start Dates, multiple Reviewers, and multiple QA staff. Similar to the “basic” filters, there is also a PIP Monitored dropdown and two additional checkbox filters below the multi-select filters: Hide Eliminated Cases and Hide De-Identified Cases. Once you have selected the desired filters, select the “Search” option just under the filters and the relevant case(s) will appear in the case list below.

Similar to the “basic” filter results, a maximum of 50 cases will display on the page at once; if your search results yield more than 50 cases, you will see links to subsequent page numbers appear just below the filters. You may click into page 2 of the case results to see cases 51-100, page 3 of the case results to see cases 101-150, and so forth. You may also use the “Reset” option to clear the filter fields and start the search process again. The OMS will remember the last filters that you applied when you leave the OSRI dashboard page (or log out of the OMS) and then return; if you no longer wish to use the same filters, click “Show” to reveal the filters then either select different filters or use the “Reset” option.

Figure 32: The OSRI Advanced Case Filters Section



Review or modify existing cases. Scroll down the OSRI dashboard (See Figure 30, above) to find a list of existing cases within your state. Each case row includes general information about the case, including the case name, type, site, Reviewers, QA Staff, Secondary Oversight Staff, and case status (e.g., Not Started, In Progress, Data Entry Complete, QA in Progress, Case Complete, Approved and Final, Case Eliminated). To view this and other general information for a specific case, click the case name and then click “Case Setup” located in the upper right corner of the case’s Case Overview page. It is within this Case Setup page that you may assign yourself to QA or Secondary Oversight of a given case.

You can click “Cases” at any time to access the OSRI dashboard and simply click the case name in the first column of the dashboard to open an existing case.

Case Overview Page

The Case Overview page (see Figure 33, below), accessible throughout the OSRI at the top of the navigation panel on the left, provides an outline of the OSRI for the selected case and allows you to navigate easily through the instrument. The page is divided into three main sections:

Case information bar. The case information bar at the top of the page provides general information about the case, including the case name, case type, case status, and PUR, as well as the Reviewers, QA, and Secondary Oversight staff. As a State, Federal, or Consultant Site Leader, you can confirm here whether you have been assigned to QA or Secondary Oversight within a given case. The case information bar appears at the top of every page within the OSRI for easy reference.

Case Overview. The main body of this page includes the Face Sheet, OSRI section, outcomes, and items. Options featured at the top of the page enable you to edit the case setup or eliminate the case entirely. The case status (e.g., Not Started, In Progress, QA in Progress) and rating of each outcome and item can be found to the right of the outcome or item's description.

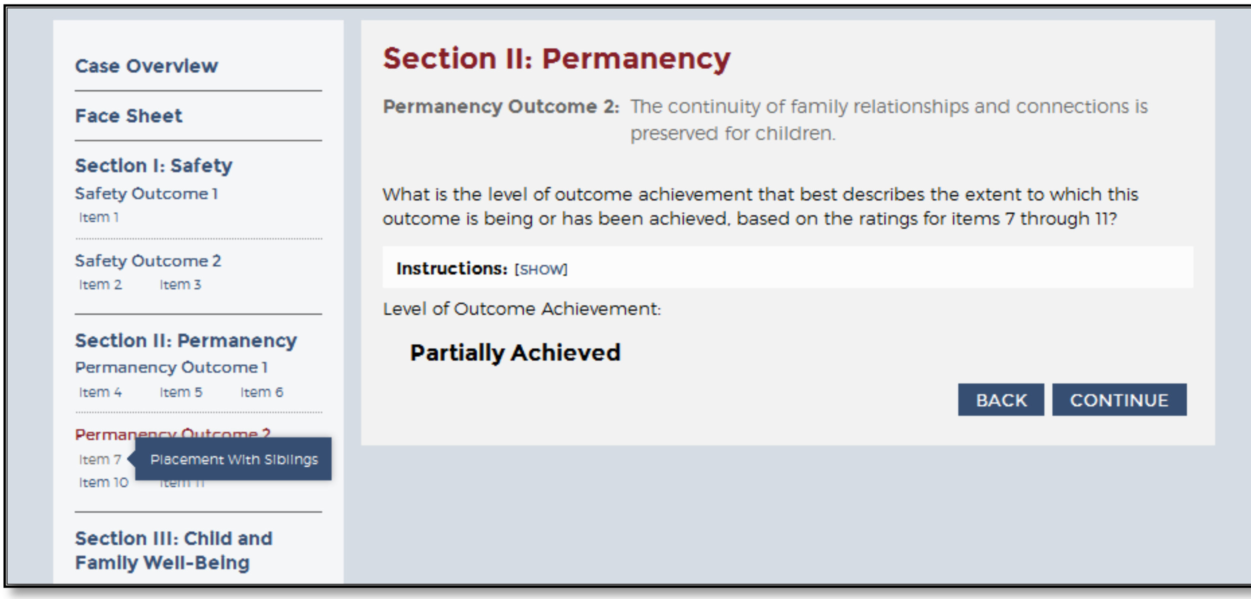
Navigation panel. The navigation panel on the left side of the page can be used to navigate to the OSRI Face Sheet, the item applicability pages, the item questions themselves, and each item rating page. As with the main body of the overview page, the outcomes and items are listed in order of completion. Hovering the mouse over an item will prompt a popup box indicating the outcome's or item's focus. You can view the applicability questions associated with each item by selecting the item number, after which the corresponding questions and rating links will appear below the item text in a blue box. Use the table, question, and rating links that appear under each item to navigate to each item's sections.

Figure 33: The Case Overview Page

Face Sheet and Items

To begin reviewing the Face Sheet or an item from the Case Overview page, select the Face Sheet or item number from the navigation panel on the left or from the Case Overview page. The Face Sheet page enables you to review information about the case and the child(ren) and participants involved. Select “Continue” at the bottom of the page to progress to Item 1.

Figure 34: Selection of OSRI Item 7 From the Navigation Panel



The first page of the item (see Figure 35, below) provides information about the item's purpose and the criteria the case must meet for the item to be applicable. Select "Continue" at the bottom of the page to progress to the next item.

Figure 35: Case Applicability Page of OSRI Item 7

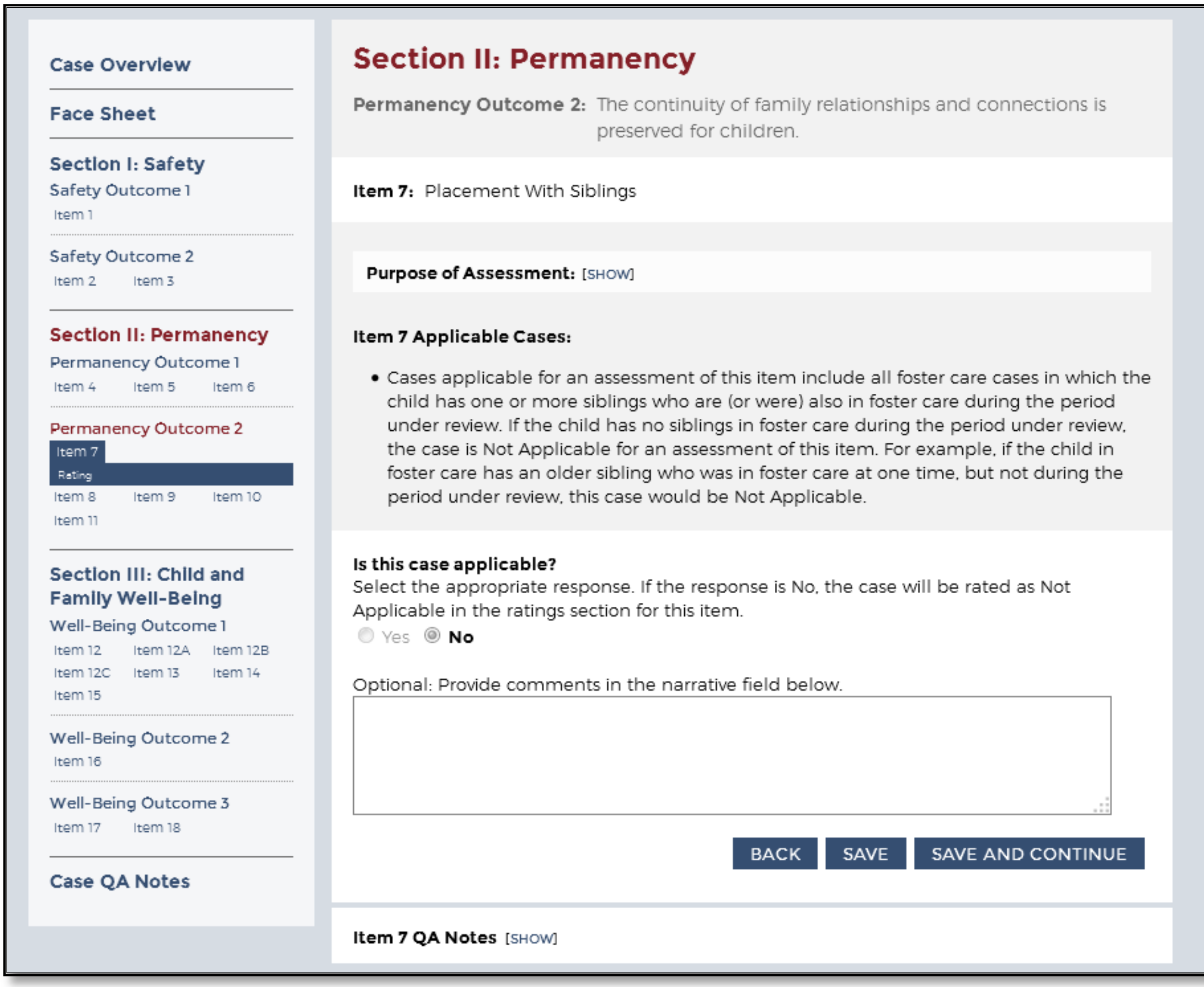


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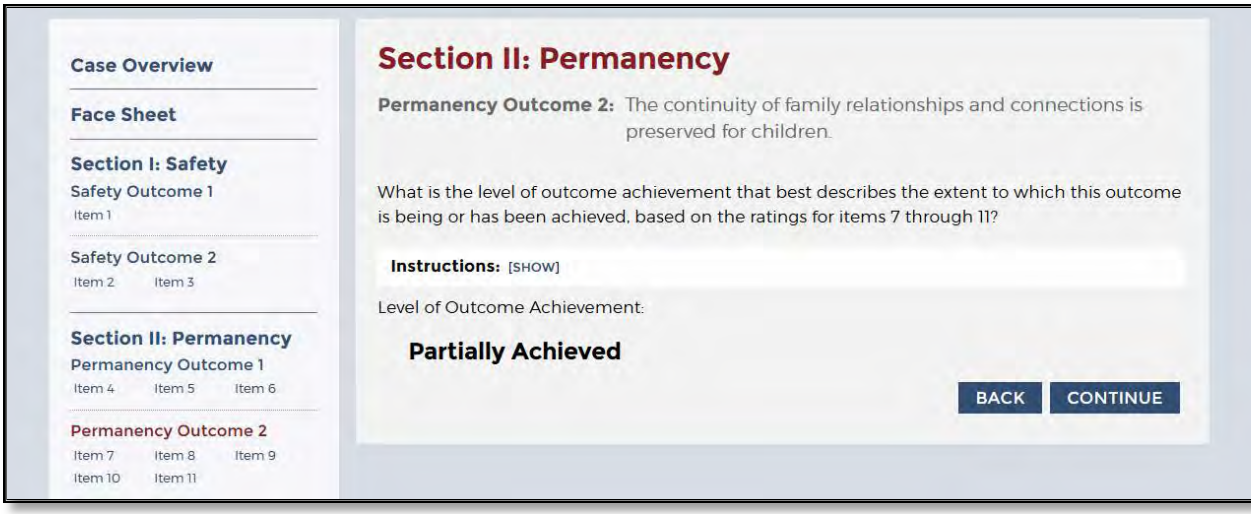
Figure 36: Message That Permanency Outcome 1 Has Been Disabled for This Case

Outcomes

The OSRI outcome ratings are dependent on the completion and rating of the related item(s) and are generated automatically by the OMS logic. The OSRI outcome rating pages can be accessed from either the navigation panel on the left or from the Case Overview page. Select the outcome name and number to navigate to the desired outcome rating page. Outcome rating pages feature information regarding the outcome's purpose, rating instructions, and level of outcome achievement (i.e., rating) if the outcome's item(s) have already been completed. If an outcome shows as Not Yet Rated, then not all of the items within it have been completed or marked as Not Applicable. You cannot submit a case for QA with unrated outcomes, so a State, Federal, or Consultant Site Leader would only see an unrated outcome if viewing a case before receiving it for QA. The outcome rating can also be viewed on the Case Overview page.

Figure 37: Permanency Outcome 2 Page



Quality Assurance

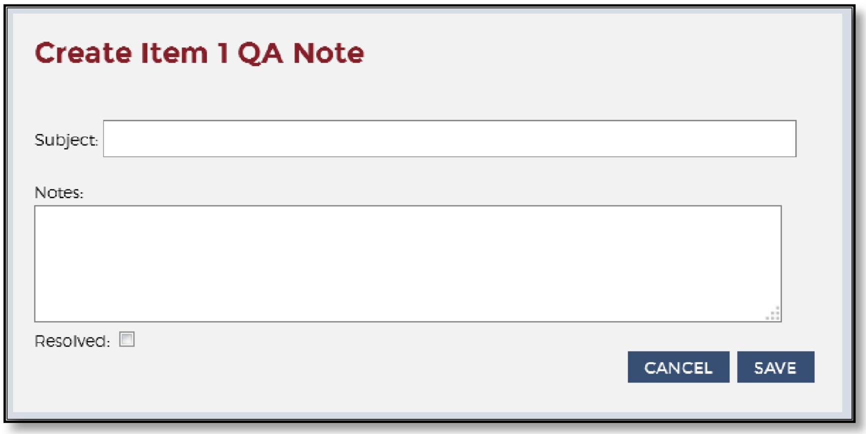
QA functionality was designed with the Children's Bureau process in mind (see the OSRI Quality Assurance Guide at https://www.acf.hhs.gov/sites/default/files/cb/round3_qa_guide.pdf), but it is flexible enough to accommodate a state's QA processes as well. QA Notes provide a way for Reviewers and QA Staff to communicate within each case because the notes are used to question, explain, and justify answers and ratings. State, Federal, and Consultant Site Leaders can create QA Notes to flag an issue or ask for an explanation from a Reviewer. Any individual assigned to that case in the role of Reviewer, QA Staff, or Secondary Oversight, as well as Observer, can review QA Notes. Individuals can modify and delete their own QA Notes.

State, Federal, and Consultant Site Leaders often lead the conversation by adding QA Notes throughout the OSRI and then sending the case back to the Reviewer to review the QA Notes and make appropriate adjustments to the case. Reviewers can, however, submit a case to QA with QA Notes already present, so State, Federal, and Consultant Site Leaders should look for QA Notes when they first receive a case for QA.

The following explains how to create, view or edit, delete, and respond to a QA Note.

Create a new QA Note. Each page within an item features a QA Notes option at the bottom of the page. To add a new QA Note, select "Show" next to the QA Notes text at the bottom of any item page, click "Create New QA Note", type the subject and note within the text boxes, and then click "Save".

Figure 38: QA Notes From OSRI Item 1



View or edit a QA Note. To view a QA Note, select “Show” next to the QA Notes text at the bottom of any item page. To edit a QA Note you created, select the “Edit” link (under the date the QA Note was made). State and Federal Site Leaders can also view all QA Notes by selecting “Case QA Notes” at the top of the navigation panel on the left and then navigating into a specific QA Note by selecting the item for which the QA Note was made. Within this Case QA Notes page, State and Federal Site Leaders have the option to “Create New QA Note,” which is a case-level QA Note rather than an item-level QA Note previously discussed.

Figure 39: OSRI Item-Level QA Note

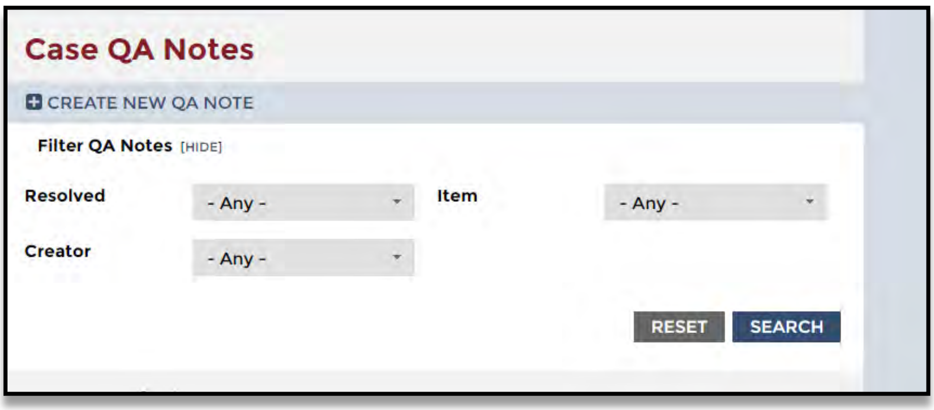
Once the QA Note is open, State and Federal Site Leaders can edit the subject or note in the text boxes and then select “Save” below. You can also select the “Resolved” checkbox and then save to indicate that a QA Note has been closed. Resolving QA Notes is an optional tracking feature and is not required to finalize a case.

Delete a QA Note. To delete a QA Note, select “Case QA Notes” at the top of the navigation panel on the left, and then select the “Delete” option (under the date the QA Note was made). Confirm the deletion by selecting “OK.” QA Notes are usually only deleted if the note was created in error. Do not delete a QA Note after it has been resolved, unless the intent is to permanently remove the QA Note from the case

Respond to a QA Note. To respond to QA Notes, select “Case QA Notes” at the top of the navigation panel on the left, click “Show” to the right of “Responses”, and then select “Respond To QA Note” within the desired QA Note.

Filter a QA Note. To locate a specific QA Note, use the "Filter QA Note" feature. On the "Case QA Notes" page, click "Show" to right of "Filter QA Notes". Select from among three filter options: Resolved, Creator, and Item.

Figure 40: Filter QA Notes



QA Notes Notification. When a user is assigned to a case and that case contains QA Notes, the user will see a notification link on the OMS Home Page when a new or updated note appears since the last time they logged into the OMS. The link will appear below the review selection dropdown box. Clicking that link takes the user to the Review QA Notes page, where they can view, search for, review, and respond to QA Notes. Users may also jump to different reviews, assuming they are assigned to those reviews, from the Review QA Notes page.

Returning a Case to Reviewer

When a State, Federal, or Consultant Site Leader has finished adding QA Notes to a case, the case is ready to be returned to the Reviewer. Returning a case to a Reviewer enables the Reviewer to address the QA Notes and to once again make changes to answers throughout the case.

Return a case to the Reviewer by clicking “Return Case to Reviewer” in the upper right corner of the Case Overview page. Once a case has been returned to a Reviewer, the case status will change from “QA in Progress” back to “In Progress,” and the Reviewer will again be able to edit the case.

Figure 41: Case Overview Page With Return Case to Reviewer and Finalize Case Options Displayed

This process can be repeated as many times as needed before a State, Federal, or Consultant Site Leader determines that the Reviewer has appropriately addressed all of his or her QA Notes and that the case is complete and ready to be finalized.

Conducting a Rating Override

The OMS calculates ratings using logic built into the system.

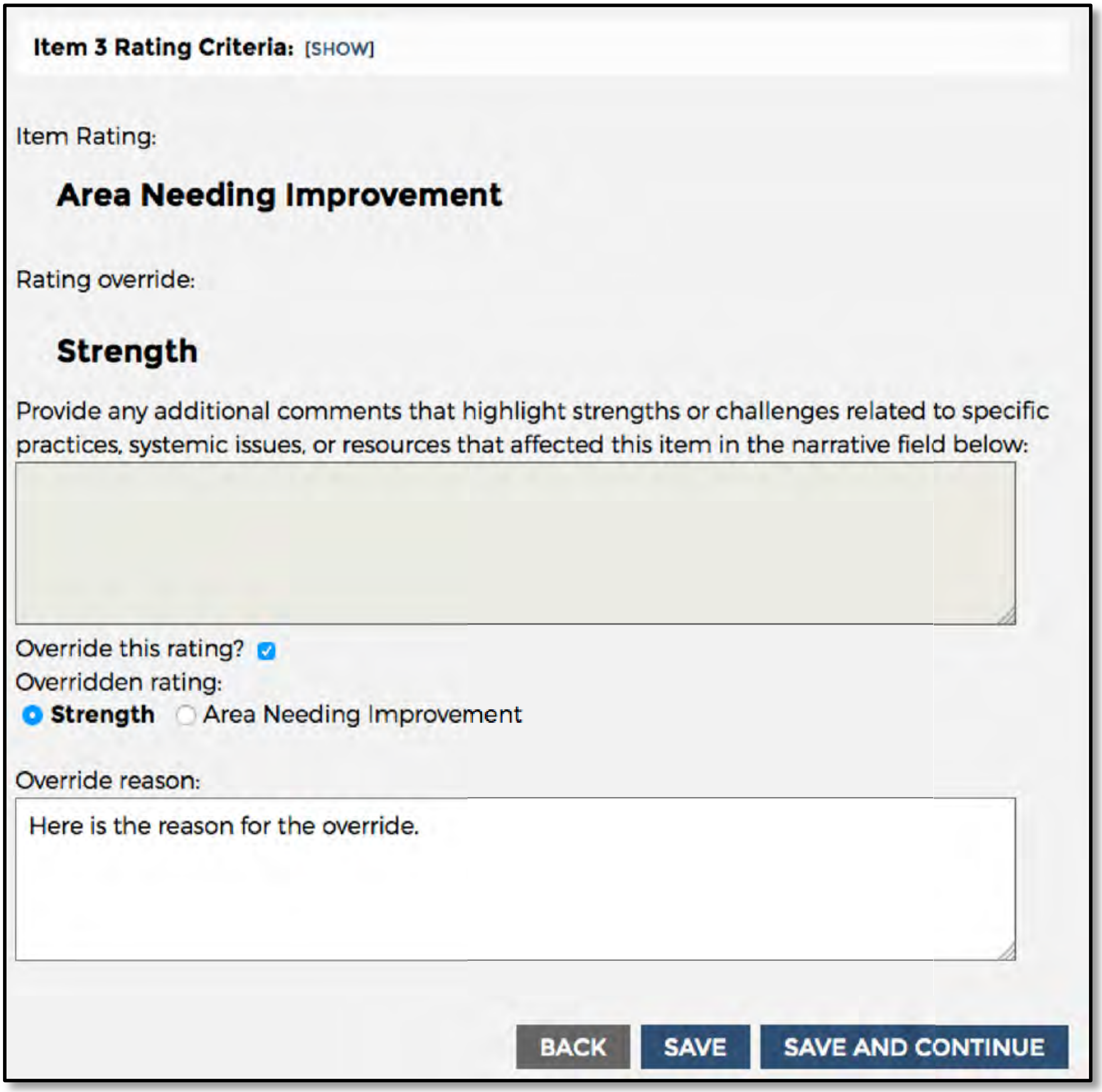
If the appropriate rating can be achieved by changing the answers to item questions, an override should not be used. In this event, the case should be returned to the Reviewer with a request to change the answers within the item to reflect the circumstances of the case.

However, it is possible that the answers to the questions within an item may lead to a rating that does not reflect the unique circumstances of the case. For such a case, if the questions have been answered correctly but the rating must be changed, a State, Federal, or Consultant Site Leader may conduct a rating override.

To conduct a rating override, the case status must be “QA in Progress” and you must be assigned to the case in the role of Initial QA, Second Level QA, or Secondary Oversight. If more than one of these roles is filled, you must consult with the other individuals in these roles and agree that the rating override is necessary.

If you have decided to conduct an override, from the Case Overview page, click on the item rating, which will take you to the item's rating page. On this page, check the box next to the question, "Override this rating?", select a new rating, and provide an override reason in the narrative field. When you have completed the rating override, click "Save." You will see that the rating page now shows a rating override. The rating override also shows on the Case Overview page.

Figure 42: Rating Page With Override



If the case is subsequently returned to the Reviewer and the Reviewer makes data changes to that item that lead to a newly calculated rating, the rating override will disappear when the case is submitted again for QA.

The overridden rating will be reflected in reports, but the question level data from items with rating overrides are not included in aggregate reports.[1]

Finalizing a Case

State, Federal, or Consultant Site Leaders in the role of Initial QA, Second Level QA, or Secondary Oversight have sole discretion in determining when a case is ready to be finalized. Whether that's upon first receipt of the case from the Reviewer or after one or more rounds of QA and Reviewer corrections, the State, Federal, or Consultant Site Leader will see both a "Submit as Complete" and a "Finalize Case" link in the upper right corner of the Case Overview page whenever the case status is QA in Progress. If a case is returned to a Reviewer, the "Submit as Complete" and "Finalize Case" links will disappear until the Reviewer has resubmitted the case for QA.

> **Submit as Complete.** Clicking "Submit as Complete" updates the case status to Case Complete, and neither a Reviewer nor a State, Federal, or Consultant Site Leader has the ability to make any further edits to the case, although they may continue to add, edit, or resolve QA Notes. Site Leaders assigned to a QA role on the case will still be able to click "Return Case to Reviewer" if further edits are needed, or they may click "Finalize Case". The Case Complete status is an optional case status that may be used to indicate that data entry and QA is now complete on a case, and the case is ready to be finalized. This case status may be helpful in tracking cases that are complete, and ready to be finalized.
>
> **Finalize Case.** Clicking "Finalize Case" updates the case status to Approved and Final, and neither a Reviewer nor a State, Federal, or Consultant Site Leader has the ability to make any further edits to the case or to QA Notes. The case is now final. Because any of the State, Federal, or Consultant Site Leaders in the role of Initial QA, Second Level QA, or Secondary Oversight can finalize a case, these individuals should communicate among themselves and with the Reviewer to determine when a case is ready to be finalized.

Eliminating a Case

Anyone who is assigned to the case in any role (Reviewer, Initial QA, Second Level QA, and Secondary Oversight) may eliminate a case any time before it is finalized.

Reasons to eliminate a case include:

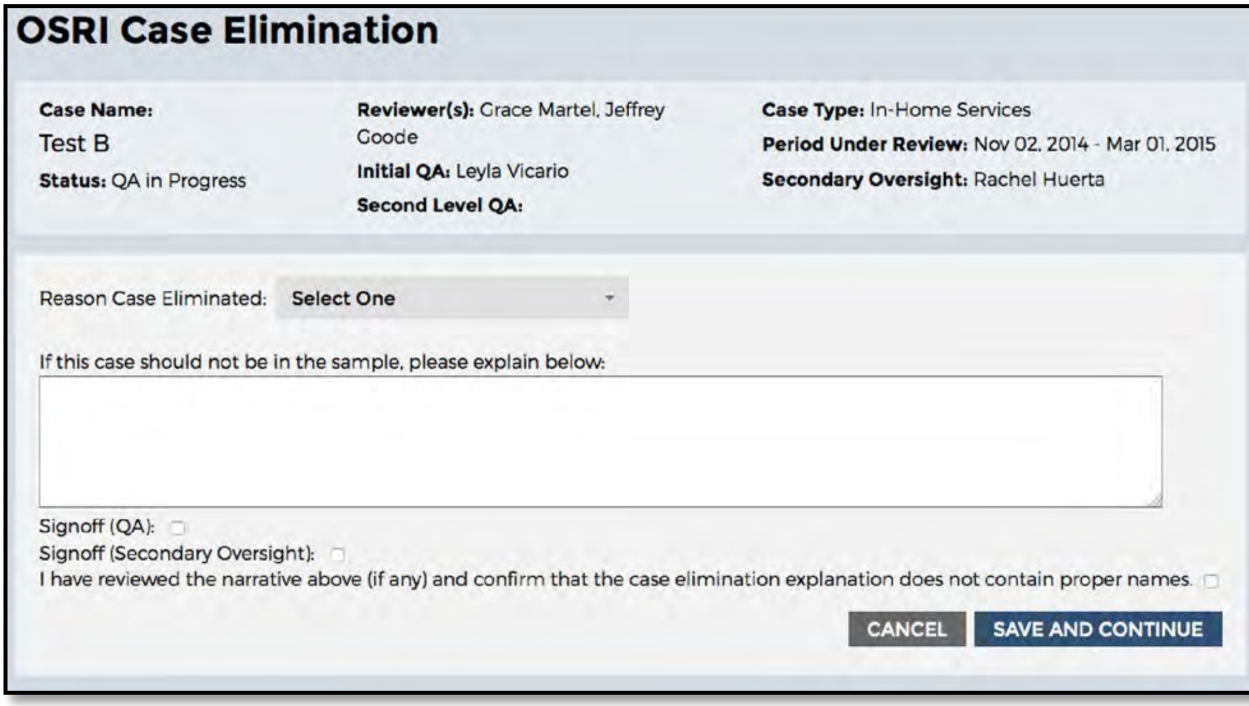
- Case created in error
- Wrong type of case selected (foster care, in-home, or in-home differential/alternative response)
- Wrong PUR Start Date entered
- Duplicate case
- Case should not be in the sample
- Wrong site selected

[1] For historical reasons, the expression "overridden rating" refers to the *replacement* rating rather than the replaced rating. For example, if the value returned by the automated OSRI is ANI and someone overrides it with a value of Strength, the latter value (Strength) is the overridden value.

To eliminate a case, go to the Case Overview page, click on “Eliminate Case” in the upper right corner of the case’s Case Overview page. You will be asked whether you want to change the status of the case to “Case Eliminated”; select “Yes” to proceed.

On the OSRI Case Elimination page, select a reason. If the case should not be in the sample, you are required to add an explanation in the narrative field provided. If you have entered narrative in the field, check the box to confirm that the explanation does not contain proper names and click “Save and Continue.”

Figure 43: Case Elimination Page



Case elimination in a CFSR requires two signoffs: Initial QA or Second Level QA, and Secondary Oversight. Case elimination for CQI Review Sites requires one signoff only: Initial QA or Second Level QA.

While you are on the OSRI Case Elimination page, if QA staff have not been assigned to the case, a link will appear at the bottom of the page to assign QA and/or Secondary Oversight for final approval of case elimination.

To finalize a case elimination, QA staff should visit the Cases dashboard and select the case with Case Eliminated (Pending Approval) status, which will take you to the Case Elimination page. Depending on your role within the case, a “signoff” box will appear. Click the appropriate box, either QA Signoff or Secondary Oversight Signoff, to approve the case elimination.

If a user mistakenly eliminates a case, please contact the CWRP Help Desk to request reinstatement. Case eliminations can be undone so long as the case’s elimination is still pending, as indicated by a status of “Case Eliminated (Pending Approval)” in the OMS. Once the elimination is finalized, it cannot be undone.

Section V: The SIG

The OMS Stakeholder Interview Guide (SIG) is available to State, Federal, and Consultant Site Leaders and may be customized at the review level and at the stakeholder interview level. Any individual designated as Federal Site Leader (CB Regional Office Site Leader, CB CFSR Unit Site Leader, or Consultant Site Leader) may set up the SIG at the review and stakeholder interview levels for the Child and Family Services Reviews (CFSRs). States may also use the SIG for CQI purposes, and the State Site Leader would set up the SIG for CQI use.

The OMS SIG features three different user roles, including Interviewer, Notetaker, and SIG Approval to create interview templates, manage data entry, engage in the Quality Assurance (QA) process, and run reports. Each of these roles has specific functions that determine a user’s involvement. Depending on the user’s role and whether the SIG is used for CQI or CFSR purposes, access to certain OMS SIG functions varies among users. The Federal Site Leader may serve in any of the three SIG roles for CFSRs. For CQI reviews, the State Site Leader may serve in all three roles. For CFSRs, state staff members do not serve as SIG Approval. For CQI reviews, federal staff, CFSR Reviewers, and QA/Note-Taking Specialists do not serve in any of the roles.

Interviewer: Users may assign themselves or be assigned as Interviewers. In this role, the user is able to set up the SIG at the review level and create and customize stakeholder interviews at the item and question levels. During the actual interview, the Interviewer has read-only access to the SIG interview template (cannot enter information in the narrative text fields) but can create, delete, edit, and mark as resolved QA Notes that they created. The Interviewer may change interview status from “Interview Complete” to “In Progress.” The Interviewer may also eliminate an interview as well as generate and download reports.

Notetaker: Users may assign themselves or be assigned as Notetaker. In this role, the user is able to enter notes in narrative text box fields for all applicable items; edit text; and enter, edit, delete, and mark as resolved QA Notes they entered. Notetakers are able to change the status of the interview to Interview Complete. When the interview status is marked as complete, the Notetaker cannot add or edit information in the narrative text fields. The Notetaker may eliminate an interview and may generate and download reports.

SIG Approval: Users may assign themselves or be assigned as SIG Approval. During the actual interview, users in this role have read-only access to the SIG. Users with this role are able to enter QA Notes and edit, delete, and mark as resolved the QA Notes they created. The user in the SIG Approval role is able to change the status of the SIG to In Progress for the Notetaker to make changes, or to Approved and Final. The user in this role may eliminate an interview and is able to generate and download reports.

Table 2: SIG Roles and Functions

User Type	Notetaker (CFSR)	Notetaker (CQI)	Interviewer (CFSR)	Interviewer (CQI)	SIG Approval (CFSR)	SIG Approval (CQI)
State Site Leader	Yes	Yes	Yes	Yes	No	Yes
Federal Site Leader	Yes	No	Yes	No	Yes	No

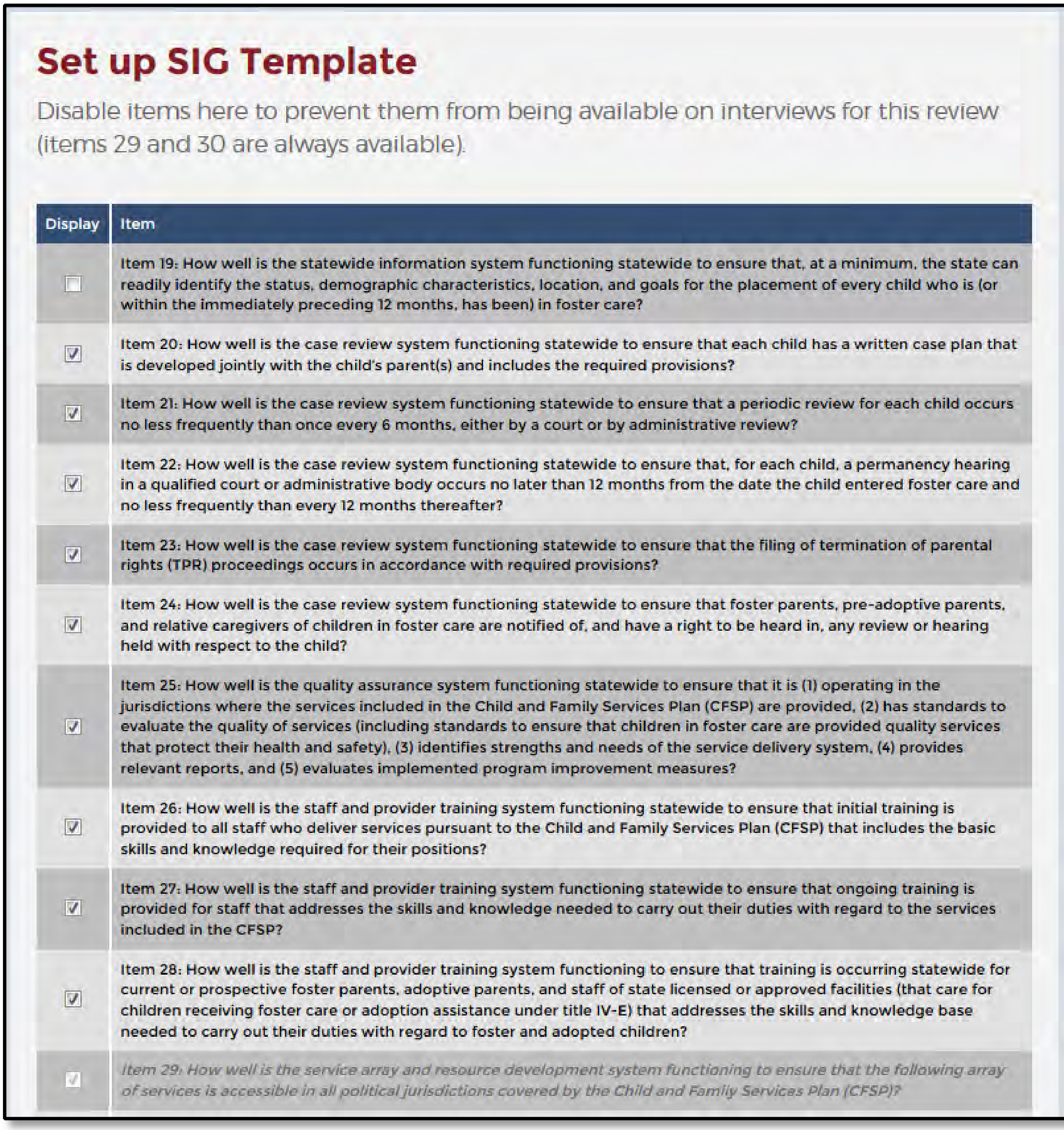
A. Home Page

After completing the login process, you are directed to the OMS Home page. From here, select a review and then select “Go to Stakeholder Interview Guide” to access the SIG.

B. SIG Set Up

The first time in a review that any user selects “Go to Stakeholder Interview Guide” on the Home Page, the user is notified that a SIG review template has not been set up for this review and he or she will see a “Set Up SIG Template” link. Selecting this link takes you to the Admin Tools page, specifically within the Set Up SIG Template page.

Figure 44: Set Up SIG Template Page



Set up SIG Template

Disable items here to prevent them from being available on interviews for this review (items 29 and 30 are always available).

Display	Item
☐	Item 19: How well is the statewide information system functioning statewide to ensure that, at a minimum, the state can readily identify the status, demographic characteristics, location, and goals for the placement of every child who is (or within the immediately preceding 12 months, has been) in foster care?
☑	Item 20: How well is the case review system functioning statewide to ensure that each child has a written case plan that is developed jointly with the child's parent(s) and includes the required provisions?
☑	Item 21: How well is the case review system functioning statewide to ensure that a periodic review for each child occurs no less frequently than once every 6 months, either by a court or by administrative review?
☑	Item 22: How well is the case review system functioning statewide to ensure that, for each child, a permanency hearing in a qualified court or administrative body occurs no later than 12 months from the date the child entered foster care and no less frequently than every 12 months thereafter?
☑	Item 23: How well is the case review system functioning statewide to ensure that the filing of termination of parental rights (TPR) proceedings occurs in accordance with required provisions?
☑	Item 24: How well is the case review system functioning statewide to ensure that foster parents, pre-adoptive parents, and relative caregivers of children in foster care are notified of, and have a right to be heard in, any review or hearing held with respect to the child?
☑	Item 25: How well is the quality assurance system functioning statewide to ensure that it is (1) operating in the jurisdictions where the services included in the Child and Family Services Plan (CFSP) are provided, (2) has standards to evaluate the quality of services (including standards to ensure that children in foster care are provided quality services that protect their health and safety), (3) identifies strengths and needs of the service delivery system, (4) provides relevant reports, and (5) evaluates implemented program improvement measures?
☑	Item 26: How well is the staff and provider training system functioning statewide to ensure that initial training is provided to all staff who deliver services pursuant to the Child and Family Services Plan (CFSP) that includes the basic skills and knowledge required for their positions?
☑	Item 27: How well is the staff and provider training system functioning statewide to ensure that ongoing training is provided for staff that addresses the skills and knowledge needed to carry out their duties with regard to the services included in the CFSP?
☑	Item 28: How well is the staff and provider training system functioning to ensure that training is occurring statewide for current or prospective foster parents, adoptive parents, and staff of state licensed or approved facilities (that care for children receiving foster care or adoption assistance under title IV-E) that addresses the skills and knowledge base needed to carry out their duties with regard to foster and adopted children?
☑	*Item 29: How well is the service array and resource development system functioning to ensure that the following array of services is accessible in all political jurisdictions covered by the Child and Family Services Plan (CFSP)?*

The Set Up SIG Template page displays each of the 18 systemic factor items. By selecting checkboxes in the column labeled Display, you determine which systemic factor items can be accessed for any interview template that is created for the review. Only those items that are checked will be accessible. Items that are not checked are disabled for the entire review. Because stakeholder interviews are required to inform the substantial conformity determination for the Service Array systemic factor, Items 29 and 30 may never be disabled at the review level and are therefore grayed out.

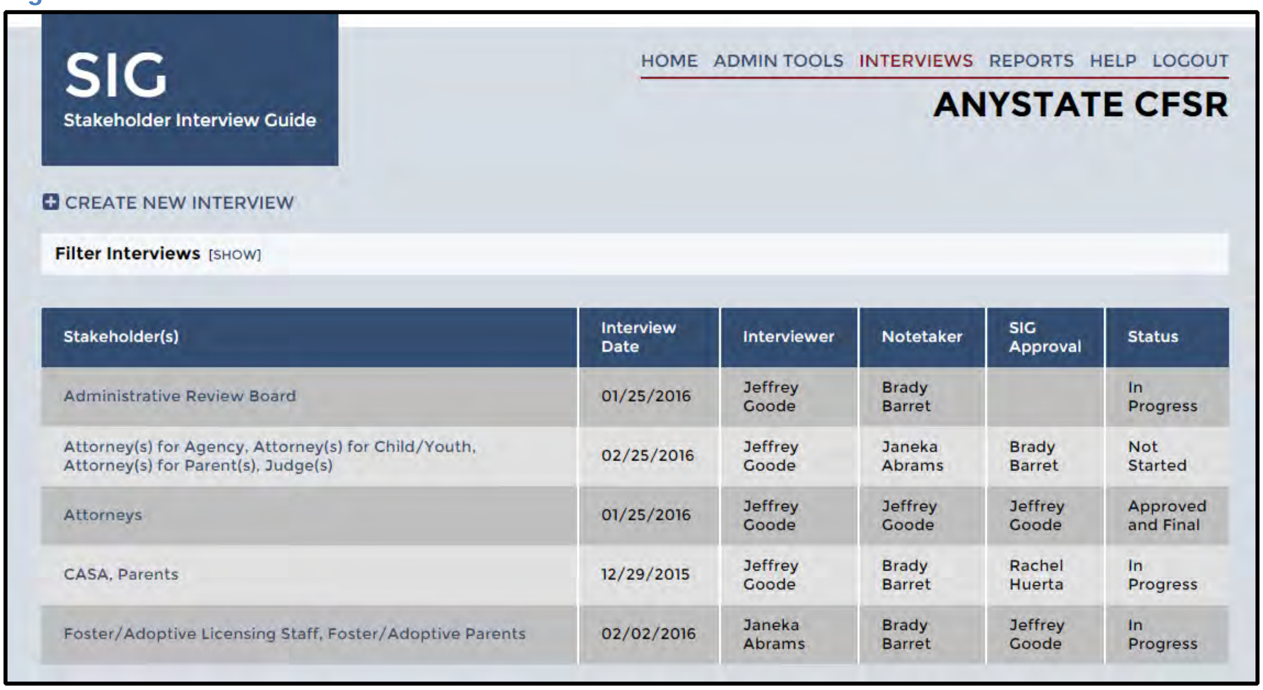
All SIG items are checked to be displayed, by default. After unchecking any items that should be disabled for the review, select “Save SIG template” to save your selections. You may edit the SIG template at the review level until the status of any interview in the review changes from Not Started to In Progress. Once that happens, the Set Up SIG Template link is no longer available. The SIG is now set up at the review level. To leave the Set Up SIG Template page and begin creating stakeholder interviews, select “Back to SIG” at the bottom of the page. This takes you to the SIG dashboard.

C. SIG Dashboard

As with the OSRI dashboard, the SIG dashboard is divided into three main components: the Create New Interview option at the top, the search filters below, and the list of existing interviews in the main body of the page. Use the menu bar in the top right corner of the page to quickly navigate to other pages within the site, including the Home, Interview, Reports, and Help pages, or use the logout option at any time to leave the OMS.

The SIG dashboard includes general information about the interviews, including Stakeholder(s) [type(s)], Interview Date, Interviewer, Notetaker, SIG Approval, and Status.

Figure 45: SIG Dashboard

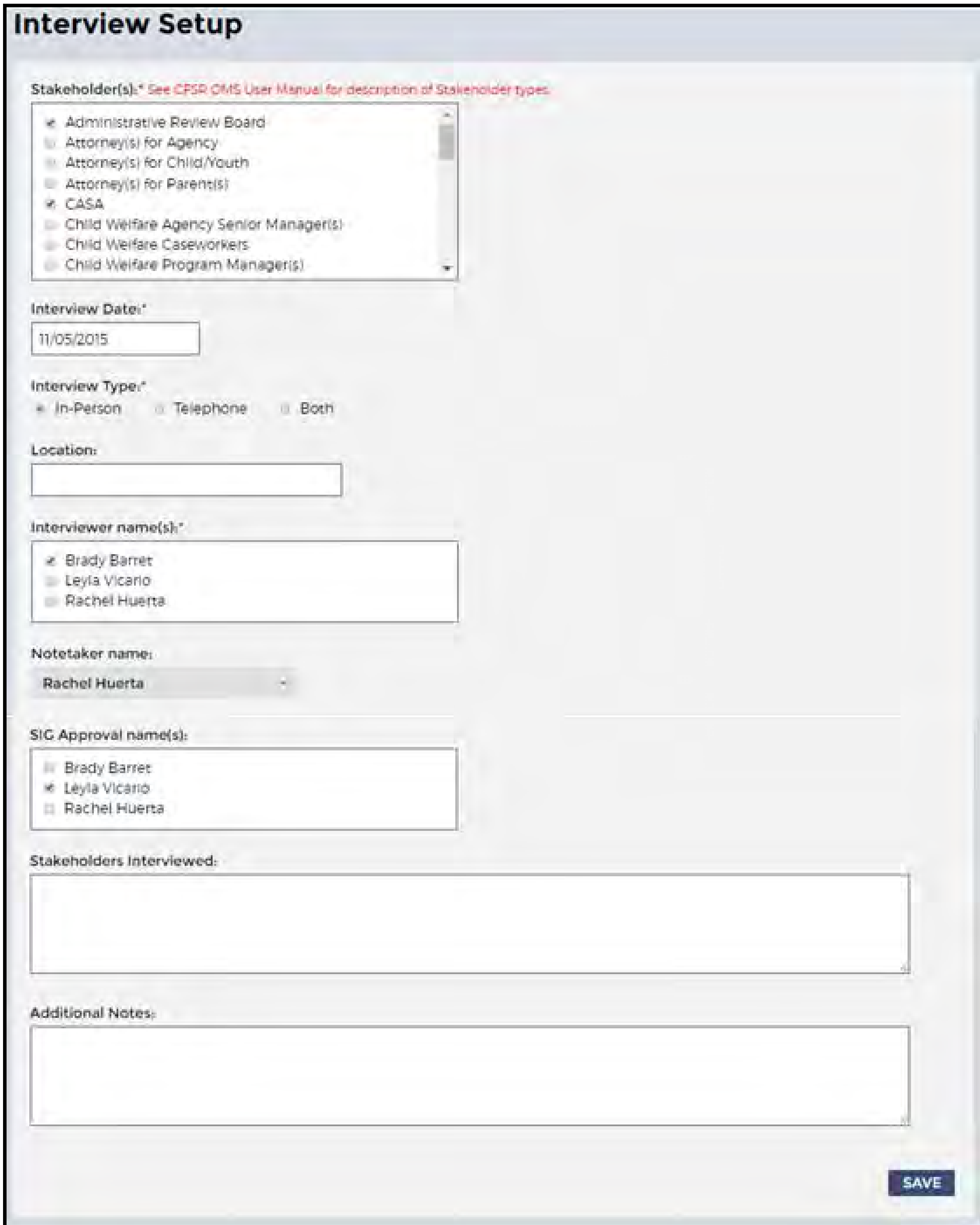


From the SIG dashboard, you can create a new interview or search and access existing interviews.

> **Create a new interview.** To create a new interview, select the “Create New Interview” link at the top left of the page. This takes you to the Interview Setup page. You must complete all fields marked with an asterisk to create the new interview. These fields include the Stakeholder(s), Interview Date, Interview Type (In-Person, Telephone, or Both), and Interviewer name(s). At least one interviewer must be selected. Once these

fields have been completed, select the “Save” option at the bottom of the page to create the new interview. Users may return to the Interview Setup page to add information or edit existing information until the interview is finalized.

Figure 46: SIG Interview Setup Page



More than one stakeholder type can be selected from the checkbox list. A list of the stakeholder types with definitions and examples can be found in Appendix B of this manual. As many as three users may be selected for the Interviewer and SIG Approval roles. Only one Notetaker may be selected. Enter the names of those participating in the interview as stakeholders in the text field labeled “Stakeholders Interviewed.” The text field labeled “Additional Notes” is available for documenting any additional information you want to capture. You may return to the Interview Setup page to add information or edit existing information until the interview is finalized.

Interviews may be further customized to focus on those items about which the specific stakeholder is most knowledgeable. See **Configure interview items** below for information about customizing each stakeholder interview.

After you have completed and saved the information, the interview will appear in the interview list in the main body of the SIG dashboard page.

Search for existing interviews. On the SIG dashboard page, select “Show” next to “Filter Interviews” at the top left to reveal filtering options. The dropdown menu filters that appear can be used to search for existing interviews that you or others have already created. Use these filters to search by interviewer, interview status, interview date, notetaker, and stakeholder type. Once the desired filters have been selected, select the “Search” option just under the filters and the relevant interview(s) will appear in the interview list below. The “Reset” option clears the search fields to start the search process again.

Figure 47: SIG Filters Section

D. SIG Overview Page

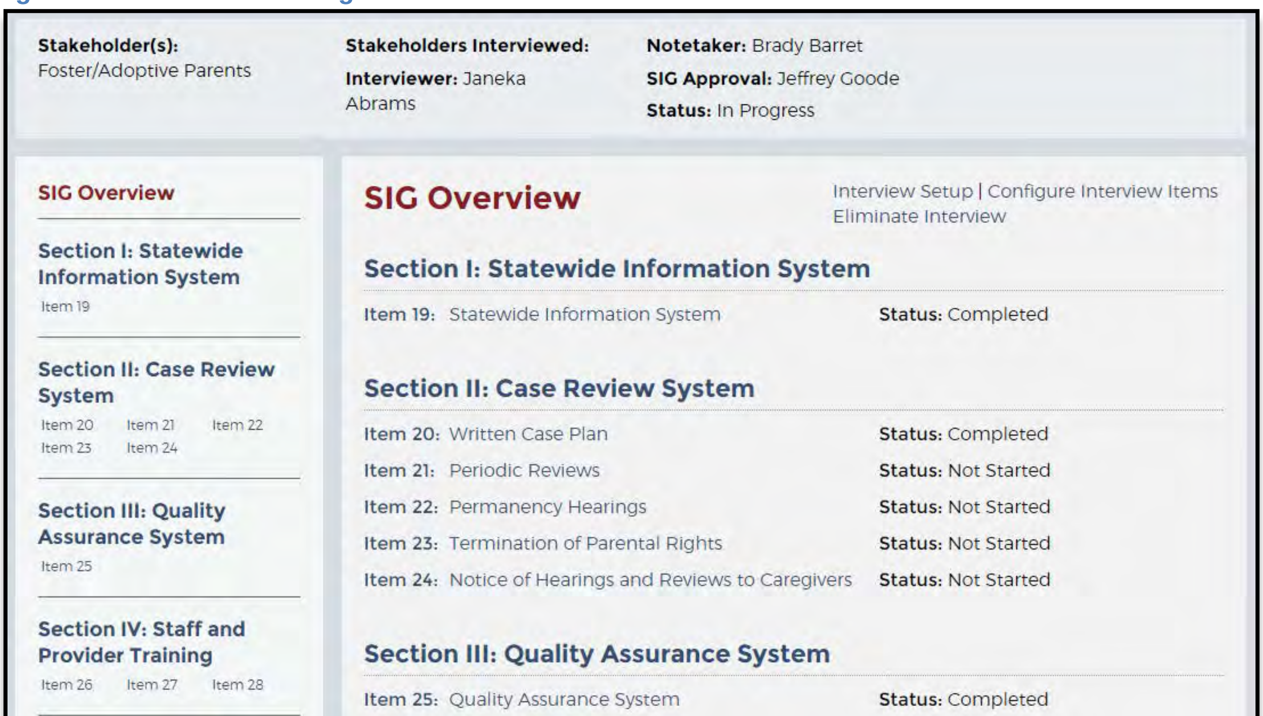
Access the SIG Overview page by selecting the stakeholder in the Stakeholder(s) column on the SIG dashboard. The SIG Overview page provides an outline of the SIG interview template for the selected interview and enables you to navigate through the SIG. The SIG Overview page is divided into three main sections:

Interview information bar. The interview information bar at the top of the page provides information about the interview, including Stakeholder(s) [type(s)], Stakeholders Interviewed [names], Interviewer, Notetaker, SIG Approval, and Status. The information bar appears at the top of every page within the SIG.

SIG Overview. The main body of the page lists the various sections and items of the SIG, as well as options to edit the interview setup, configure interview items, or eliminate the interview. There are also various options for changing the status of the SIG based upon whether or not narrative text has been entered into all applicable narrative text fields. The status of each item (e.g., not started, in progress, disabled for this review, not applicable, or completed) can be found to the right of the item number and title and is a useful point of reference for assessing progress. Each item status must be marked as "Completed," "Disabled for this Review," or "Not Applicable" to complete the SIG.

Navigation panel. Use the navigation panel on the left side of the page to navigate to the SIG sections, items, and item questions. Hovering the mouse over an item will prompt a popup box indicating the item's focus, or status if it is disabled for the review or not applicable for the particular interview.

Figure 48: SIG Overview Page

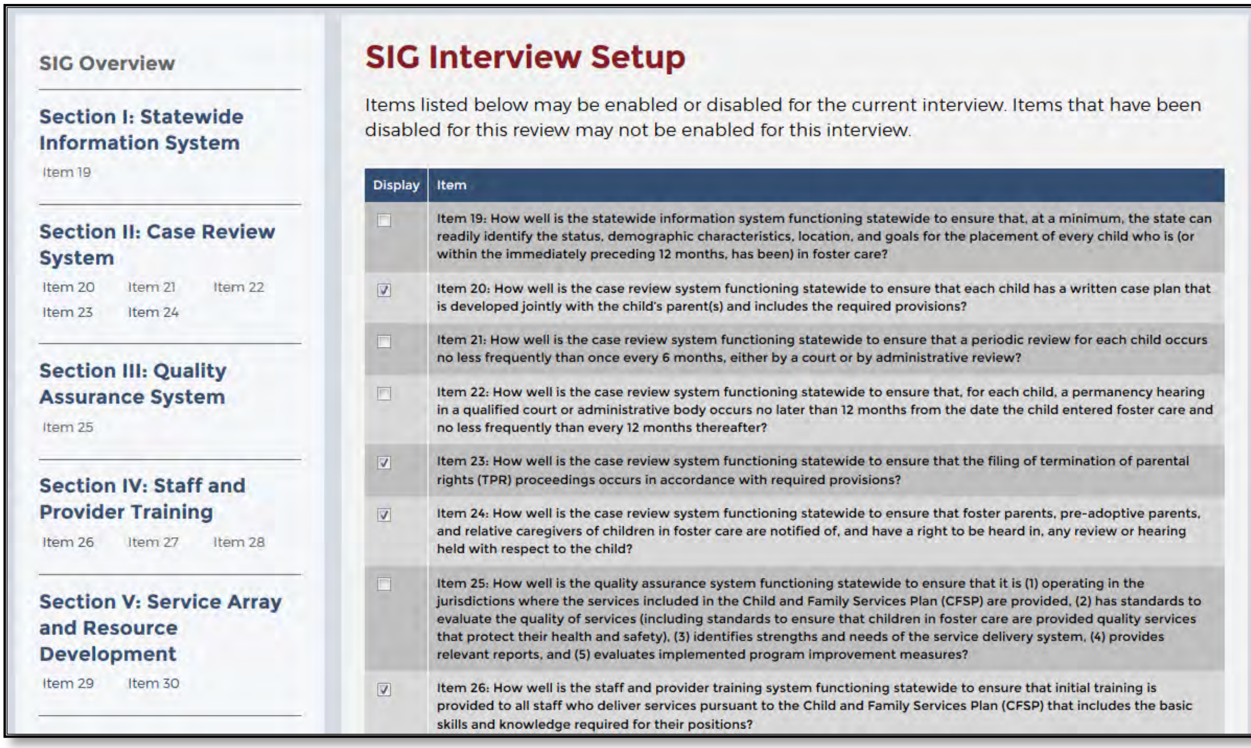


Review or modify existing interview setup. To review or modify an existing interview setup, select the stakeholder from the first column on the SIG dashboard to access the interview. Then select "Interview Setup" in the upper right corner of the SIG Overview page. This will take you back to the Interview Setup page. Make the required edits and select "Save" at the bottom of the Interview Setup page to save changes and return to the SIG Overview page.

Configure interview items. Each stakeholder interview may be customized to capture information for specific items. To customize the interview template, select "Configure Interview Items" from the top right of the SIG Overview page. This brings up the SIG

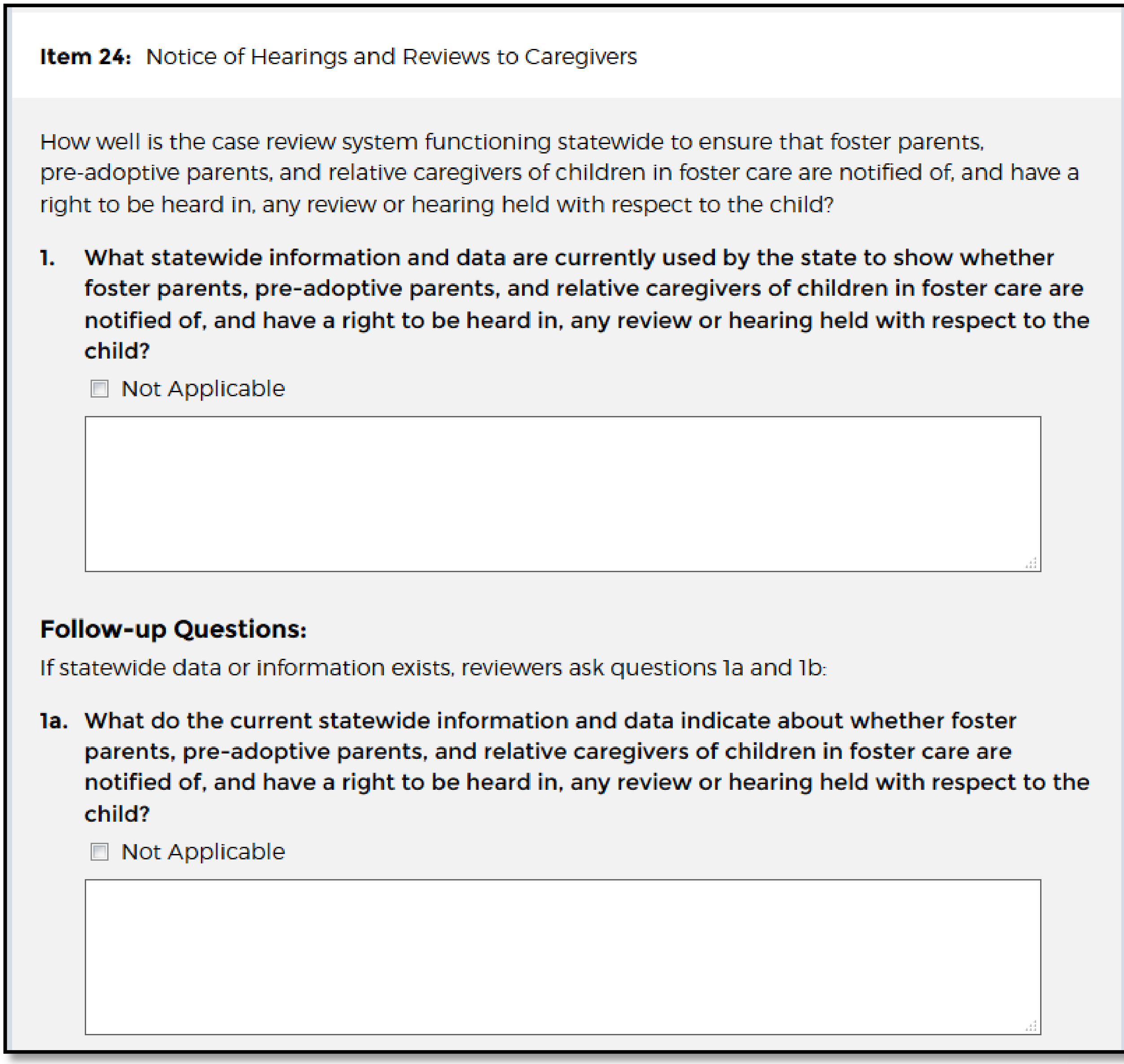
Interview Setup. Items listed may be enabled or disabled by checking the box in the display column. Items that have been disabled at the review level may not be enabled. Select "Save SIG Setup" to save the customized interview template and return to the SIG Overview page. While users in the Interviewer or SIG Approval roles can only check an item question as Not Applicable while the interview status is Not Started, users in the Notetaker role can check an item question as Not Applicable at any time before the interview is finalized.

Figure 49: Configure Interview Item Page



Configure interview questions. Each stakeholder interview may be further customized at the item question level to capture the specific information being sought from the stakeholder during the interview. To customize the item questions, the user must be in the Interviewer or SIG Approval role. The user selects the item number in the navigation panel on the left side of the Interview Overview page or from the list of items on the SIG Overview panel. This brings the user to the item's page. Under each question there is a small check box labeled "Not Applicable." Click on the checkbox to hide all questions within the item that are not going to be asked during the interview with the stakeholder, and select "Save" at the bottom of the page. If you select all the checkboxes within an item and then select "Save," an error message will appear stating, "You marked all the questions in this item as NA; please consider whether the item should be NA."

Figure 50: Configure Interview Question Example



E. Entering Information Into SIG Items

The Notetaker enters information into the SIG. To enter information about an item, select the item number in the navigation panel on the left side of the Interview Overview page or from the list of items on the SIG Overview panel. The item questions and follow-up questions will then appear. The Notetaker can then document information from the interviews in the narrative text box for each question. The Notetaker is reminded that proper names should not be included in the narrative text box for the questions and should only be captured on the Interview Setup page in the narrative text field labeled “Stakeholders Interviewed.” As in other elements of the OMS, standard copy, cut, and paste commands work in the SIG to support note-taking activities.

All applicable text boxes must be completed. If the stakeholder does not have relevant information, the Notetaker must document that the question was asked but information was not provided. If time constraints or other issues result in a question not being asked, the Notetaker documents that the question was not asked. The Notetaker uses any of the “Save” buttons throughout the page to save information. This changes the status of the item to “In Progress.” After information has been entered into all of the text boxes for each question in an item and is saved, the item status will automatically change to “Completed.”

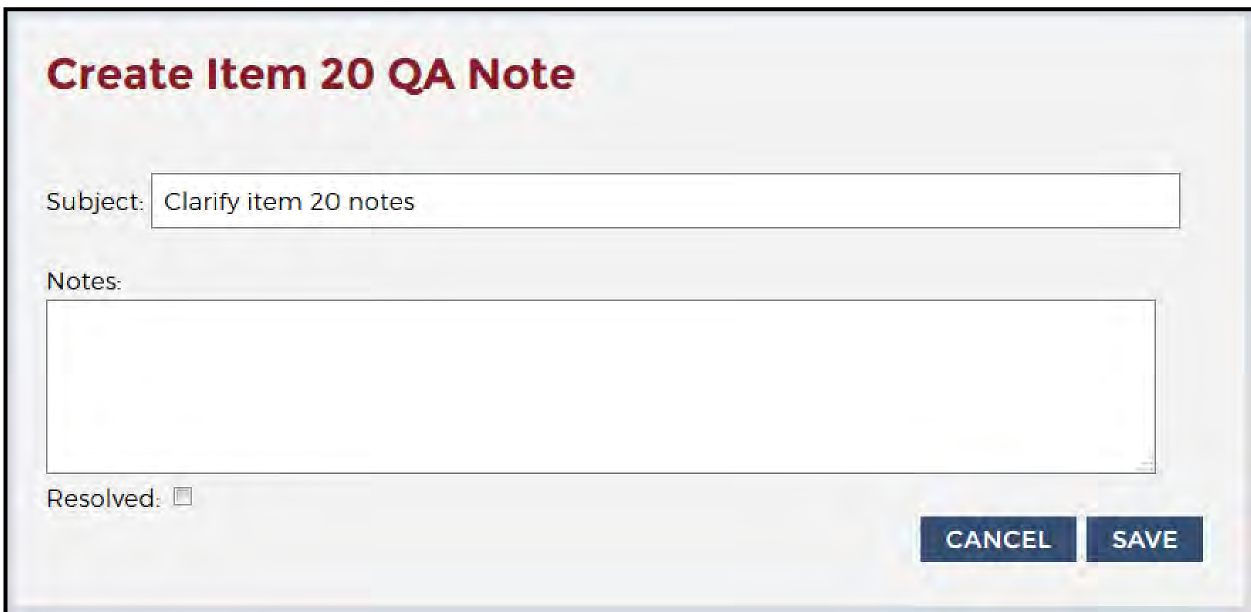
F. SIG Quality Assurance

Users serving in the Notetaker, Interviewer, and SIG Approval roles can create, review, modify, and delete QA Notes within the OMS SIG. Users may only edit, delete, or mark resolved QA Notes created by themselves.

Create a new QA Note. Each page within an item features a QA Notes option at the bottom of the page. To add a new QA Note, select “Show” next to QA Notes at the bottom of any page within an item, click “Create New QA Note,” type the subject and note within the text boxes, and select “Save.”

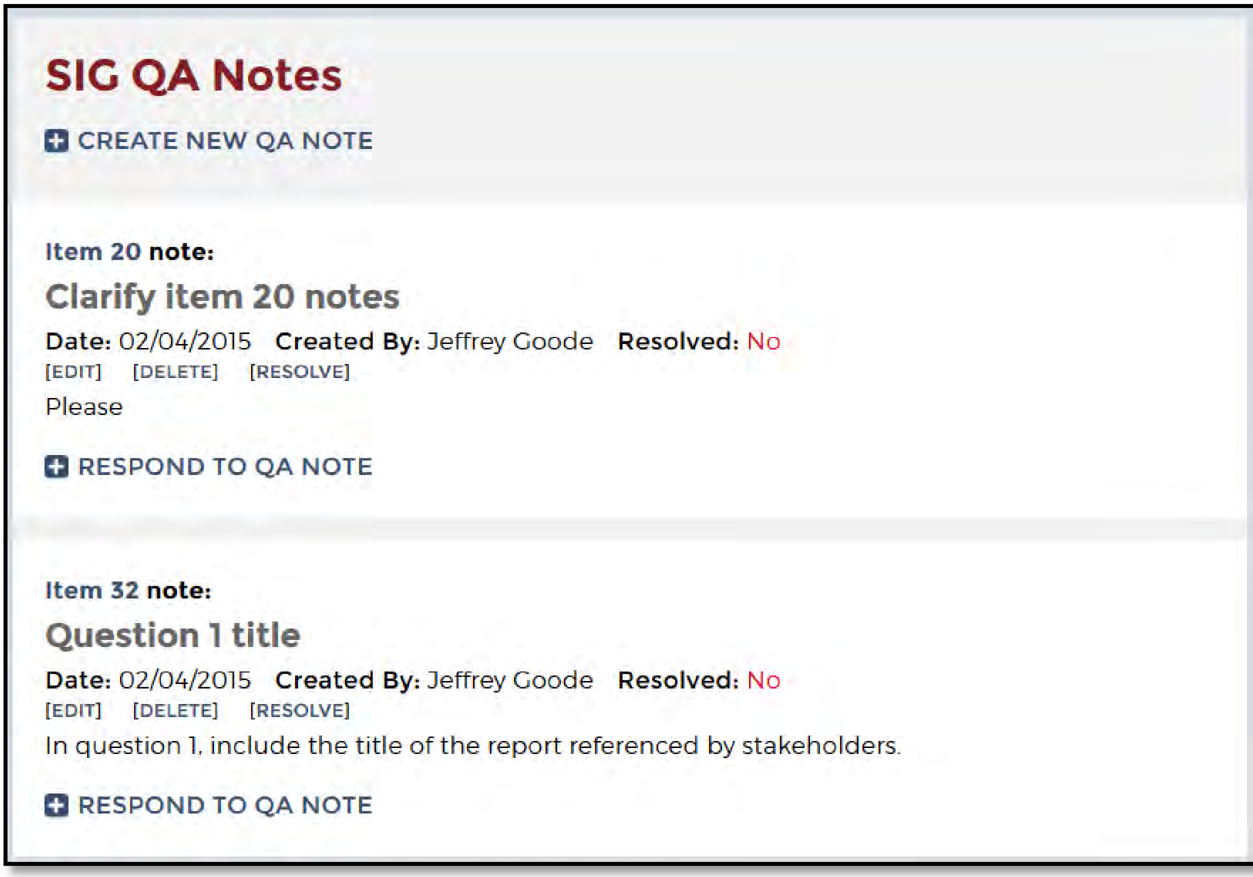
View or edit a QA Note. To view a QA Note, select “Show” next to QA Notes at the bottom of any page within an item. To edit the QA Note, click the “Edit” link under the date the QA Note was made. Users in the Notetakers, Interviewers and SIG Approval roles can also navigate to a QA Note by selecting “SIG QA Notes” at the bottom of the navigation panel on the left.

Figure 51: QA Notes Section for SIG Item 20



Once the note is open, the user who created the note can edit the subject or the note in the text boxes and then select “Save” below. The user who created the note can also select the “Resolved” checkbox and then save to indicate that a QA Note has been closed. Resolving all QA Notes is not required to finalize a SIG.

Figure 52: SIG QA Notes Page



Delete a QA Note. To delete a QA Note, select “SIG QA Notes” at the bottom of the navigation panel on the left and then select “Delete” within the desired QA Note.

Respond to a QA Note. To respond to a QA Note, select “SIG QA Notes” at the bottom of the navigational panel on the left and then select “Respond To QA Note” within the desired QA Note.

G. Reviewing, Approving, and Finalizing SIG

When the status of every item in the SIG is “Disabled for this Review,” “Not Applicable,” or “Completed,” the “Set Interview Complete” option will appear for the Notetaker on the SIG Overview page. The Notetaker selects “Set Interview Complete.” A pop-up message will appear asking, “Are you sure you want to mark this as complete?” Select “Okay” to change the interview status on the SIG dashboard to “Interview Complete.” If the names of the stakeholders have not been entered into the Stakeholders Interviewed narrative field on the Interview Setup page, the user will get an error message stating, “Please specify the stakeholders interviewed on the Interview Setup page.” Once the names have been entered and the page has been saved, the Notetaker will be able to change the interview status by selecting “Set Interview Complete.”

Users in the Interviewer, Notetaker, and SIG Approval roles all can review the SIG and provide feedback on the content of the notes. These users may also change the status of the interview to “Set Interview in Progress” to allow the Notetaker to make additional edits to the notes.

To approve and finalize the SIG, the user in the SIG Approval role selects the interview on the SIG dashboard from the Stakeholder(s) column. After review of the SIG Overview page to ensure that all fields are completed, and review of the applicable items and QA Notes, the SIG Approval user may mark the SIG as approved and finalized by selecting “Set Interview Final” on the SIG Overview page. The SIG interview is now final.

H. Eliminating a SIG

Anyone who is assigned to the interview in any role (Interviewer, Notetaker, SIG Approval) may eliminate an interview any time before it is finalized.

To eliminate an interview, go to the SIG Overview page and click on Eliminate Interview in the upper right corner of the interview’s SIG Overview page. You will be asked whether you want to change the status of the interview to Interview Eliminated; select “Yes” to proceed. You will return to the Interview dashboard where the interview will show a new status: Interview Eliminated. No approval or justification is required to eliminate an interview.

Section VI: Generating Reports

You can select “Reports” from the top of any OSRI or SIG page to access the full set of reports available on the OMS. Within the OSRI, Reviewers have access to the Common Reports and Case-Level Reports. Within the OSRI, State, Federal, and Consultant Site Leaders have access to Common Reports, Case-Level Reports, Review-Level Reports, and Item-Specific Reports; State, Federal, and Consultant Site Leaders also have access to the SIG Reports.

The OSRI Reports page contains an option to the right of each report type to “Show Description” which, if clicked, displays a brief description of each type of report. To shrink the description, users select “Hide Description”. The descriptions of each of the four OSRI report types are:

> **Common Reports:** Common Reports are available to everyone (Reviewers, Site Leaders, Observers, and OMS State Administrators) at any time.
>
> **Case-Level Reports:** Case-Level Reports are available to everyone (Reviewers, Site Leaders, Observers, and OMS State Administrators), according to their Review Site designation (if any). These reports include data for the selected case, no matter the case status; however, report data only includes items that have ratings. "Case History Logs" are the exception as they begin tracking case changes, including all system and auto-updated changes, when the user clicks "Save" at the point of case creation. Reports should be considered preliminary until the case is finalized.

Review-Level Reports: Review-Level Reports are available to Site Leaders, Observers, and OMS State Administrators according to their Review Site designation (if any). Review-Level Reports are not available to Reviewers. These reports include data for all cases, no matter the case status (unless report filters are applied); however, report data only includes items that have ratings. Reports should be considered preliminary until all cases are finalized.

Item-Specific Reports: Item-Specific Reports are available to Site Leaders, Observers, and OMS State Administrators according to their Review Site designation (if any). Item-Specific Reports are not available to Reviewers. These reports include data for all cases, no matter the case status (unless report filters are applied); however, report data only includes items that have ratings. Reports should be considered preliminary until all cases are finalized.

Figure 53: OSRI Reports Page as a Site Leader

The browser presents selected reports on screen (most reports require that you first select an item, case, case status, case type, PUR start date, and/or site, then click “Run Report”);

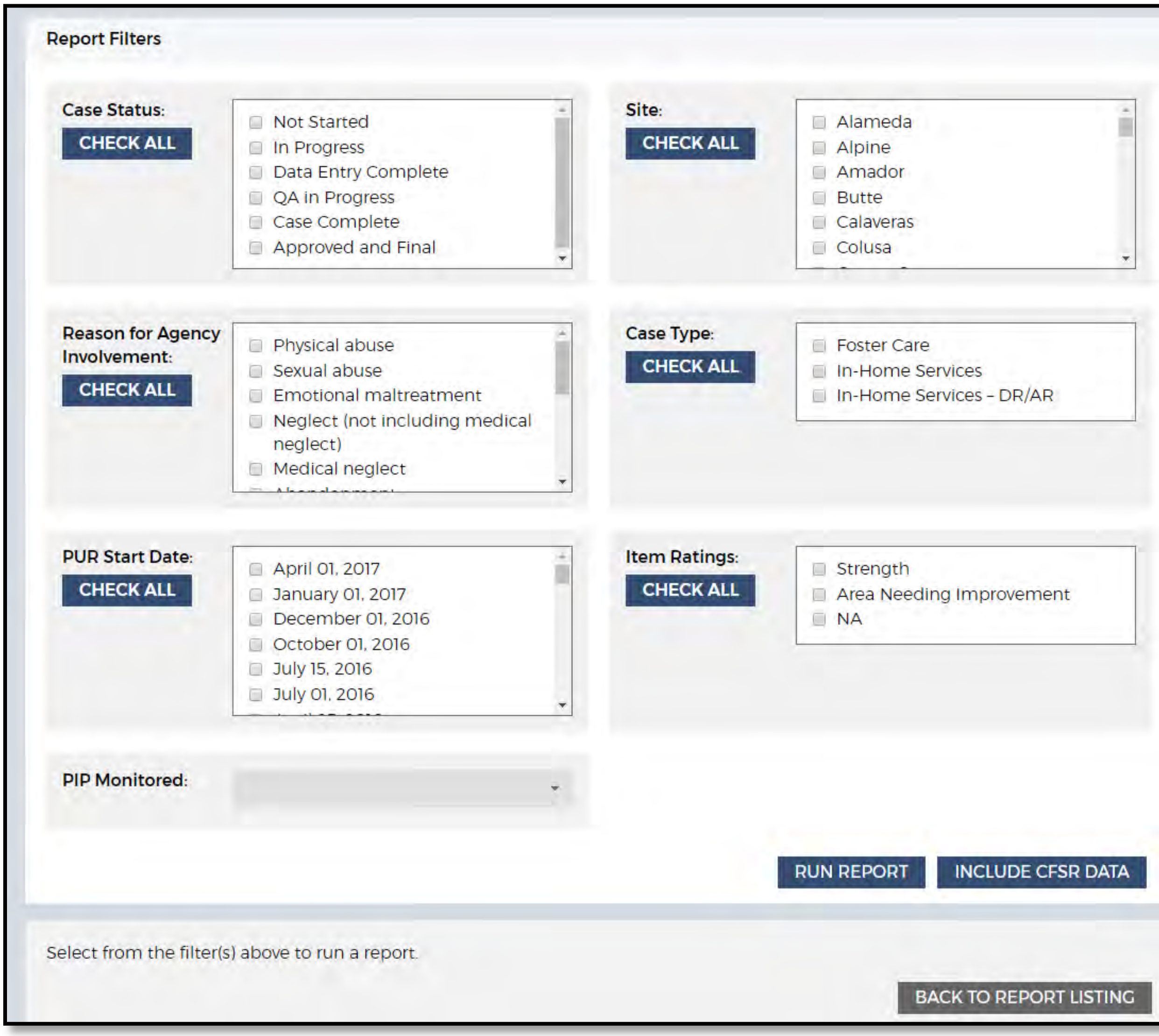
however, users also have the option to export each report to a PDF or Excel file format, or a Word file format for certain reports.

Most reports are generated at the state level as an aggregate of data from all cases or interviews that exist within a state’s CFSR or CQI site. You also have the option to generate these reports at the site level, which presents an aggregate of data combining all cases or interviews within a specific Review Site. Those reports that are generated at the case level display a dropdown menu that lists each case name. Users must select a case name from the dropdown menu to generate case-level reports. Those reports that are available under Review-Level Reports and Item-Specific Reports offer multi-selection filters. For instance, you may select one, some, or all sites; one, some, or all case statuses; one, some, or all case types; and one, some, or all PUR start dates. The ability to select multiple options within each filter makes each of these reports highly customizable.

Each OSRI and SIG report contains an individualized report description just below the report title. This same description will remain at the top of the report if the report is exported to a PDF or Excel file format. A list of individualized report descriptions can be found in Appendix C of this manual.

Any OMS Site Leader or Observer who is assigned as such in both a state’s CFSR and CQI review may merge CFSR data into CQI reports. To do this, enter the CQI site, choose Reports, and select a specific report; for example, "Item 1 Report." At the bottom of the screen, choose "Include CFSR Data." You may now select your desired filters and click “Run Report”. The merge will not work in the other direction; i.e., a user may not merge CQI data into a CFSR report.

Figure 54: Merging CFSR Data Into CQI Reports



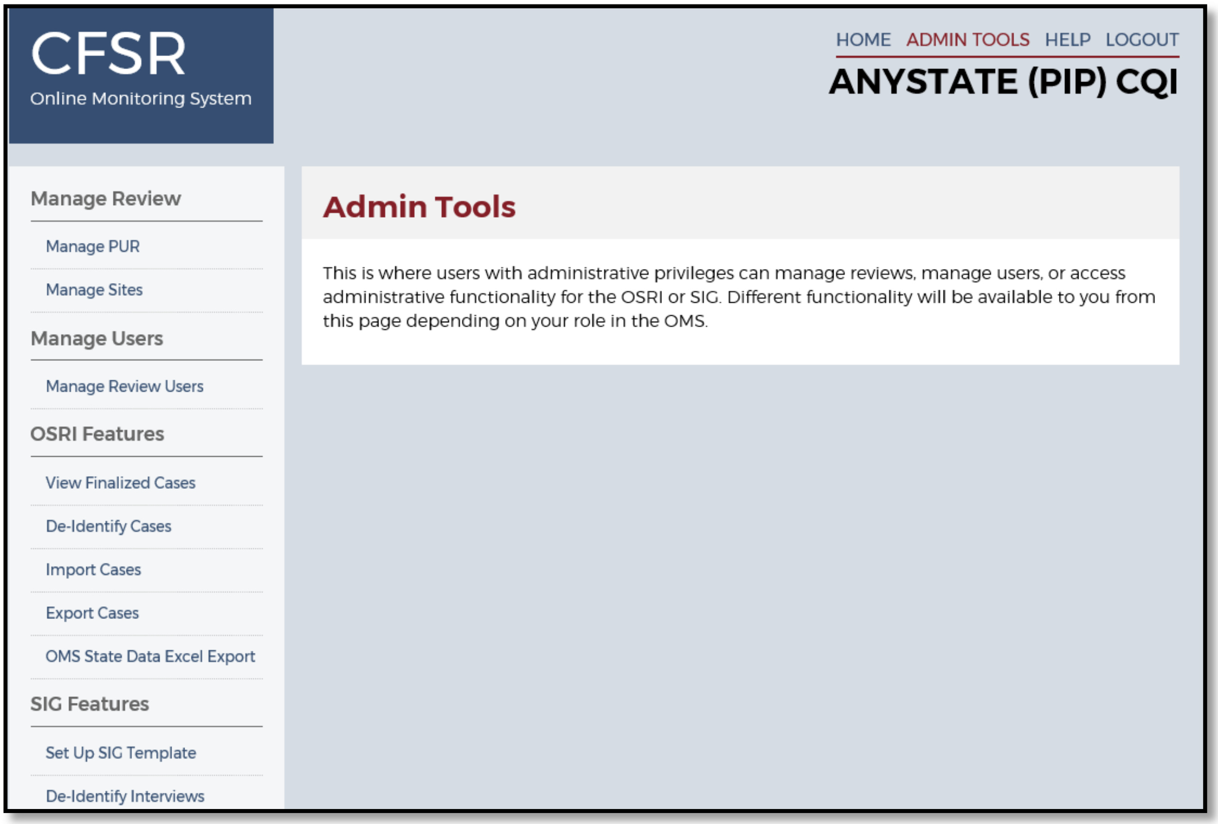
Section VII: OMS State Administrator Responsibilities

OMS State Administrators can set up and manage several aspects of the state's OMS Training Site, CQI Review Site, and CFSR Review Site (for states conducting their own case reviews). OMS State Administrators are given access to select review setup and management functions through the Admin Tools page.

- As OMS State Administrator for a CFSR Review Site (for states conducting their own case reviews), users may manage users, manage sites, view a report on finalized cases, and import cases to or export cases from the OMS.
- As OMS State Administrator for an OMS Training Site, users may manage users, manage sites, manage the PUR start date, designate the case sampling type, view a report on finalized cases, import cases to or export cases from the OMS, set up the SIG template, and practice de-identifying finalized cases and interviews.
- As OMS State Administrator for a CQI Review Site, users may manage users, manage sites, manage the PUR start date, designate the case sampling type, view a report on finalized cases, import cases to or export cases from the OMS, set up the SIG Template, and de-identify finalized cases and interviews. OMS State Administrators may also merge CFSR data with CQI data in reports, though only from a CQI review.

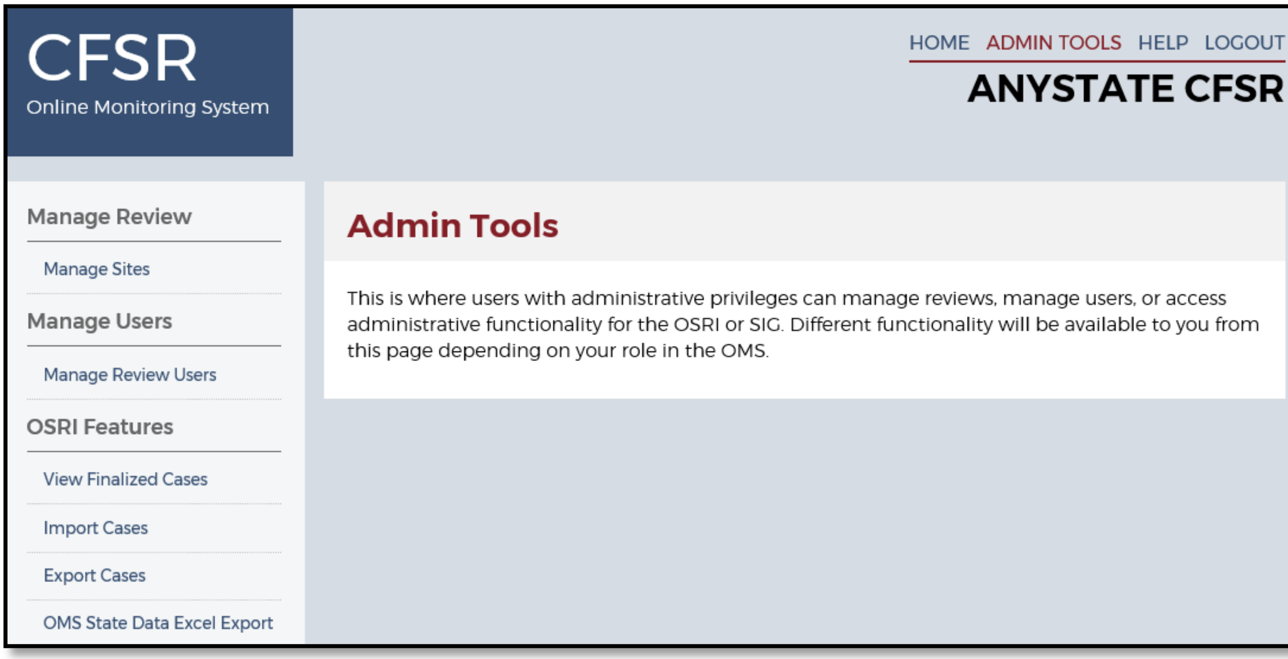
Upon logging in and selecting a review, you will see "Admin Tools" in the upper right corner of the screen, next to Help. The Admin Tools page will present the options available to the OMS State Administrator with that review type; e.g., CFSR, CQI, or Training. Within a CQI Review Site, if you click "Admin Tools," you will be taken to the Admin Tools page where you will see nine options on the left side of the page: Manage PUR, Manage Sites, Manage Review Users, View Finalized Cases, De-Identify Cases, Export Cases, OMS State Date Excel Export, Set Up SIG Template, and De-Identify Interviews. A tenth option, Import Cases, will not appear unless the OMS State Administrator requests that functionality be enabled for the review.

Figure 55: Admin Tools Page—CQI Review Site



For CFSR Review Sites, the Admin Tools page offers five options on the left side of the page: Manage Sites, Manage Review Users, View Finalized Cases, Export Cases, and OMS State Data Excel Export. A sixth option, Import Cases, will not appear unless the OMS State Administrator requests that functionality be enabled for the review.

Figure 56: Admin Tools Page—CFSR Site



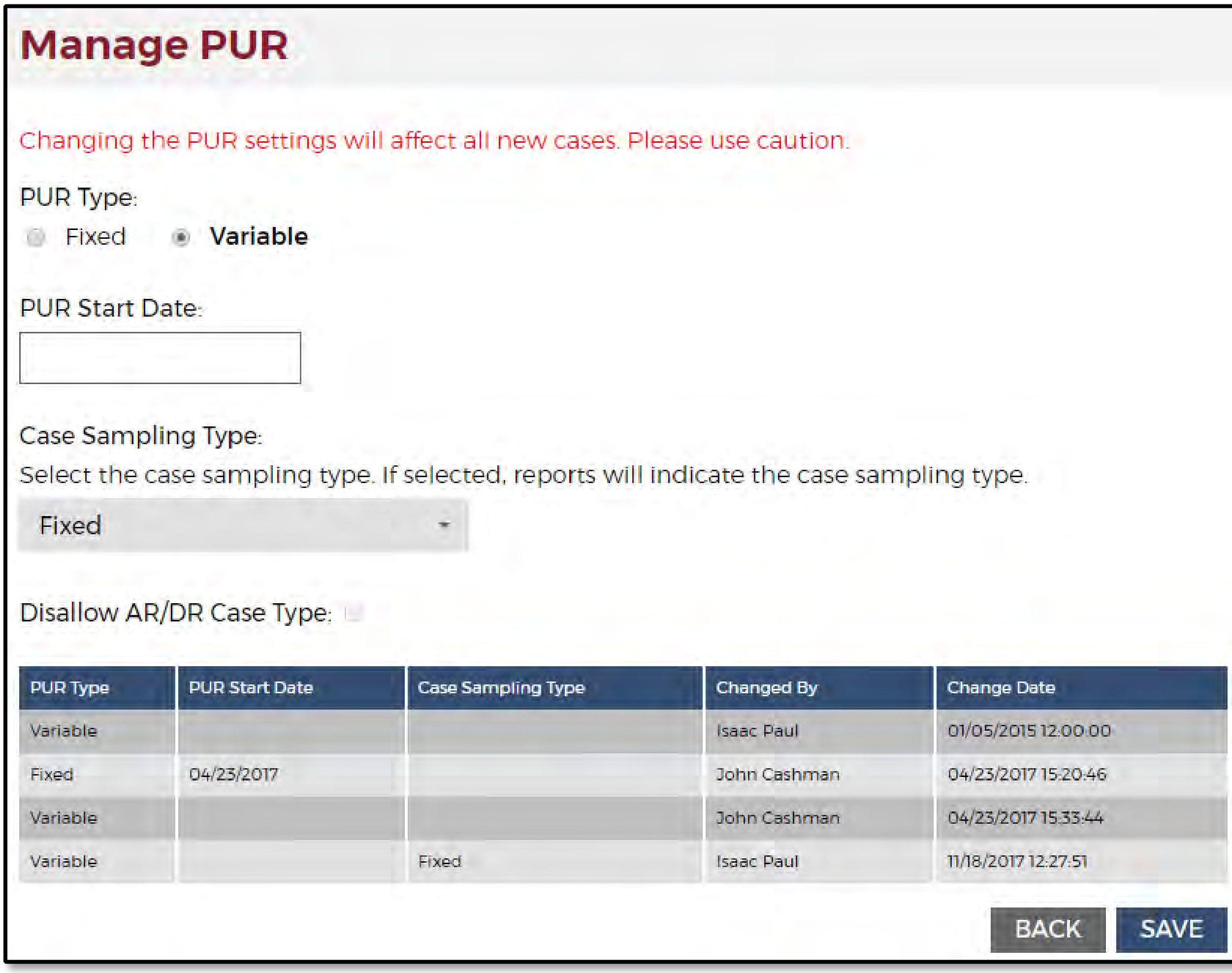
Click the function on the left side of this screen to navigate to that specific page. Guidance on each page follows below.

A. Managing PUR

"Manage PUR" is where the OMS State Administrator can select a fixed or variable PUR for cases within a Training or CQI review. The PUR type may be adjusted for the entire review even after the first case has been created. Note: once a case is created with a fixed PUR, the PUR cannot be changed for that case or any of the cases that preceded it.

The PUR start date may be set for an entire Review Site as a fixed date or it can be open so that reviewers will enter a PUR start date when they create each case. Before any cases are created, you may set the PUR start date. The default setting is as an open PUR. This feature is available to OMS State Administrators for the Training and CQI Review Sites. After the initial PUR date is set, OMS State Administrators may enter a new fixed PUR date that will apply to all subsequent cases in the review. They may also toggle back and forth between a fixed and variable PUR, with each toggle resulting in a new PUR date from that point forward. OMS State Administrators have the option to set the "Case Sampling Type" on this page (Rolling Monthly, Rolling Quarterly, or Fixed) which, if set, will appear in the headers of all reports. Finally, OMS State Administrators may check the Disallow AR/DR Case Type box if they wish to exclude Alternative and Differential Response case types from the review.

Figure 57: Manage PUR Page



Manage PUR

Changing the PUR settings will affect all new cases. Please use caution.

PUR Type:

Fixed Variable

PUR Start Date:

Case Sampling Type:

Select the case sampling type. If selected, reports will indicate the case sampling type.

Fixed

Disallow AR/DR Case Type:

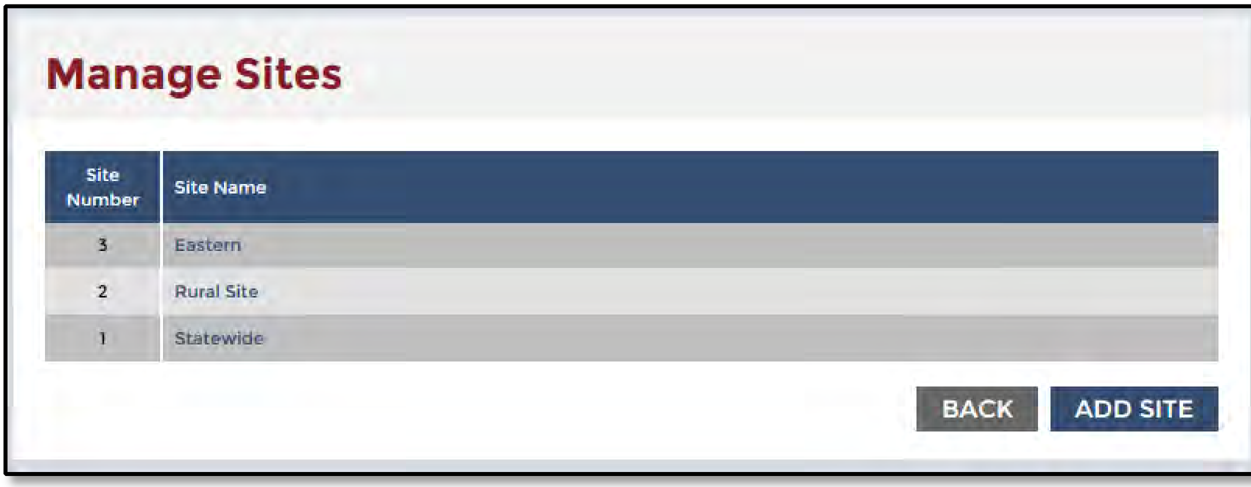
PUR Type	PUR Start Date	Case Sampling Type	Changed By	Change Date
Variable			Isaac Paul	01/05/2015 12:00:00
Fixed	04/23/2017		John Cashman	04/23/2017 15:20:46
Variable			John Cashman	04/23/2017 15:33:44
Variable		Fixed	Isaac Paul	11/18/2017 12:27:51

BACK SAVE

B. Managing Sites

“Manage Sites” is where the OMS State Administrator can add sites, edit the name of existing sites, or designate a site (or sites) a “metro” site Sites designated as “metro” sites will appear as such throughout the OSRI and in the reports. Click “Add Site” to add sites (the “Site Number” associated with each site is automatically set by the OMS in chronological order). Click an existing “Site Name” to edit that individual site name. To delete a site entirely, please contact the CWRP Help Desk. The OMS State Administrator can add or change the names of sites for the Training, CQI Review, and CFSR Review Sites.

Figure 58: Manage Sites Page



C. Managing Users

"Manage Review Users" is where the OMS State Administrator can see all users assigned to the review, their status, the date of their last login, their roles, and their site assignments. All review participants with access to the review are listed on this page; however, OMS State Administrators may only click the names of State Reviewers, State Site Leaders, and Observers to make changes. OMS State Administrators can make changes to user roles or access by clicking the user's name and selecting a different role from the dropdown menu, or assigning them to a specific site (or sites). Users have access to all Review Sites unless set otherwise. In addition, the OMS State Administrator can activate or de-activate existing state users assigned to the Review Site. This feature is available to OMS State Administrators for the Training, CQI Review, and CFSR Review Sites.

Figure 59: Manage Review Users Page

Manage Review Users

All review participants with access to this review are listed below, however as an OMS State Administrator, you may only click the names of State and read-only participants to make changes. You may click a participant's name to deactivate their access to the review, adjust their role, or adjust their site assignment. Deactivating a participant only prevents them from accessing this review. If a state participant should no longer have access to the OMS, please notify the CWRP Help Desk.

Users have been de-activated for this review. If these users should not have access to this review and should be removed from the OMS, please notify the CWRP Help Desk.

User Name	OMS Active	Review Active	Last Login	Role	Sites
BG	✓	✓	August 8th, 2017	CB CFSR Unit Site Leader	All Sites
Bob Grabhorn	✓	✓	November 18th, 2017	State Site Leader	All Sites
Brad Flurer	✓	✓	November 20th, 2017	Consultant Site Leader	All Sites
Brad Karrfalt	✓		May 3rd, 2017	State Administrator	All Sites
Brad Woodcock	✓	✓	November 6th, 2017	State Administrator	All Sites
Brady Barret	✓	✓	November 18th, 2017	State Administrator	All Sites
Christine Hanson	✓	✓	October 12th, 2016	State Reviewer	All Sites
Dan Draves	✓	✓	November 18th, 2017	State Site Leader	All Sites
Debbie Ramelmeier	✓	✓	Never	Consultant Site Leader	All Sites
Grace Martel	✓	✓	June 29th, 2015	State Reviewer	All Sites
Isaac Paul	✓	✓	November 20th, 2017	State Administrator	All Sites

D. Designating PIP-Monitored Cases

OMS State Administrators may designate a case as “PIP Monitored” or to instruct their Reviewers or Site Leaders to do so. When creating a new case, OMS State Administrators, Reviewers, and Site Leaders will all see a checkbox at the bottom of the Case Setup page labeled “PIP Monitored.” Selecting this “PIP Monitored” checkbox designates the case as a PIP-monitored case and, as such, the case will now be displayed when any OMS user sets the “PIP Monitored” filter on the OSRI dashboard page or within the OSRI reports.

Note: As it’s typically the Reviewer who creates a new case, the OMS State Administrator should communicate with the Reviewer before the case is created to instruct them to check the “PIP Monitored” box, as needed. Alternately, the OMS State Administrator may create the case, check the “PIP Monitored” box, and assign the appropriate Reviewer to the case before instructing the Reviewer that the case has been created and they may now begin work on the case. Once the Case Setup page is saved, the “PIP Monitored” checkbox is locked and cannot be checked or unchecked without first contacting the CWRP Help Desk. If you need to check or uncheck the “PIP Monitored” box on a case that has already been created, contact the CWRP Help Desk staff, who will notify the Children’s Bureau and check or uncheck the box on your behalf.

E. View Finalized Cases

“View Finalized Cases” is the page where OMS State Administrators can track all cases that have been finalized in the review to assist with managing the de-identification process. The table displays the case name, the site, the date on which the case was created, the number of days from creation to finalization, the date on which the case was finalized, the number of days from finalization to de-identification, and the date on which the case was de-identified. The “Days From Creation to Finalization” and the “Days From Finalization to De-Identification” continues counting up until there is a finalization or de-identification date listed, at which point the number of days ceases counting. OMS State Administrators can export this table to either PDF or Excel formats using the export links on the page.

Figure 60: View Finalized Cases Page

Finalized Cases

Export: PDF XLSx

Case Name	Site	Date Created	Days From Creation to Finalization*	Date Last Finalized	Days From Finalization to De-Identification*	Date De-Identified
AS-SITE01-02	Statewide	02/01/2015	74 days	04/16/2015	0 days	04/17/2015

*Ceases counting once there is a Finalization/De-Identification date.

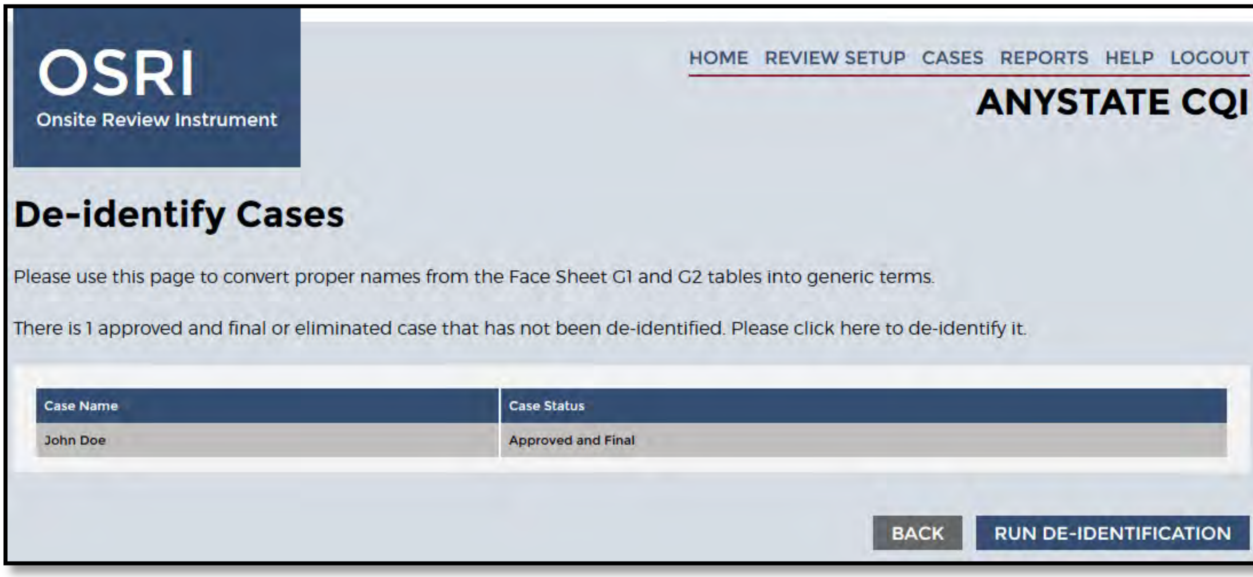
F. De-Identifying Cases

De-Identify Cases is the page where OMS State Administrators will de-identify all cases with the status of Approved and Final or that have been eliminated from the review. This page lists the cases that are ready to be de-identified. Click “Run De-Identification” to de-identify all cases displayed on this page (cases cannot be de-identified on an individual case basis, but de-identification can be run multiple times as additional cases are finalized). De-identification converts the case name into a consistent format (“State-Site#-Case#”) and converts all proper names in the Face Sheet into generic labels (e.g., Target Child, Child 1, Mother 1). Contact the CWRP Help Desk for assistance in mapping a de-identified case name back to its original case name.

For CQI Review Sites, the OMS State Administrator ensures that cases are de-identified per an established schedule as soon as possible after they are finalized (JBS and the Children’s Bureau manage de-identification for CFSR Review Sites, and the Training Site is wiped each month, so it does not need to be de-identified). De-identification of confidential information is an important step in fulfilling the security requirements. To ensure that data remain secure, we ask that each OMS State Administrator oversee the case finalization and de-identification process for your state. We recommend the following guidelines:

1. Cases should be finalized within 60 days of opening.
2. Cases should be de-identified within 14 days of finalization.

Figure 61: De-Identification Page



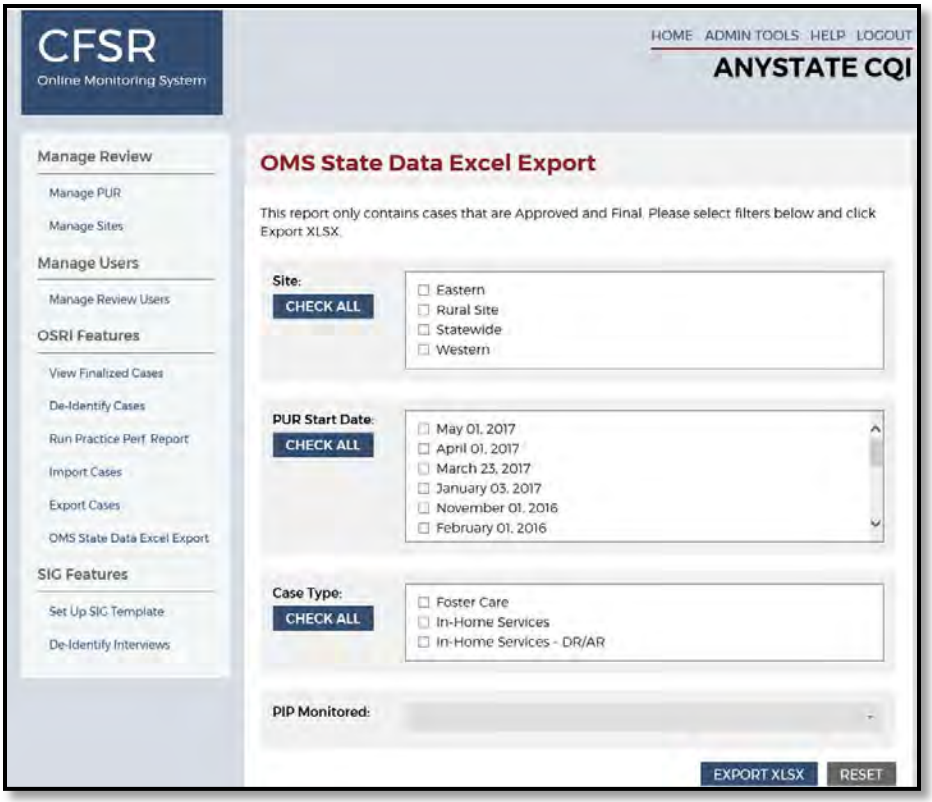
G. Export Cases

The OMS State Administrator may export cases with a status of Approved and Final from the “Export Cases” page. All finalized cases are displayed in a table on this page. The table shows the case name, site, the date the case was created, and in the fourth column, an “Export XML” link. Clicking this link will create and download the case data in an Extensible Markup Language (XML) file format. Alternately, you may click the “Export All” link at the bottom of this page to export all finalized cases at once; clicking “Export All” will download a zipped folder containing the individual XML files for each case. For more information on exporting cases from or importing cases to the OMS using XML, see the “OMS XML Materials” linked from the OMS Help page (in Section VIII below). Note: for large numbers of cases (more than 1,000), users have the option of filtering by Site and PUR Start Date in the Admin Tools. This will allow them to process the export in batches since the system cannot export more than 1,000 cases at a time.

H. OMS State Data Excel Export Report

OMS State Administrators and CB staff may choose to run the OMS State Data Excel Export report. On the Admin Tools page, under the OSRI Features category, click “OMS State Data Excel Export” to access the page. The filters available in this report include Site, PUR Start Date, Case Type, and PIP Monitored. The report displays the item and outcome ratings for each case with a status of Approved and Final. The report automatically generates a file in Microsoft Excel format. Each case appears as a single row in the Excel file, with results for each of the items and outcome ratings appearing in separate cells.

Figure 62: OMS State Data Excel Export Report



I. Set Up SIG Template

Set Up SIG Template is discussed in Section V-B above.

J. Close Review

Although OMS State Administrators do not have access to see or manage the “Close Review” function on the Admin Tools page, you may contact the CWRP Help Desk to request that your CQI Review or Training Site be closed at any time. Closing a review automatically and instantaneously changes the entire review to “read-only.” Specifically, all existing OSRIs and SIGs become “read-only” for all users (regardless of their OMS roles) and the option to create a new OSRI or SIG is removed for all users (regardless of their OMS roles). All reports remain available, depending on the user’s existing OMS role and site designation. In addition, most Admin Tool functions will become disabled for those users with Admin Tools access, except for those functions that are “read-only” (such as View Finalized Cases).

If needed, any “Closed” review can instantly be “Re-opened,” re-enabling all standard editing and functionality in the OSRI, SIG, and Admin Tools. A review can be “Closed” and “Re-Opened” as many times as needed. OMS State Administrators may “Close” a CQI Review or Training Site and reopen the site as needed. This may be helpful in between review periods or immediately before or after a state training.

For CFSR Review Sites, the review will be closed after all cases are finalized and de-identified. As mentioned, OMS State Administrators do not see this function on the Admin Tools page, but may request that their CQI Review Site be “Closed” at any time.

Section VIII: Help Page

The Help page is accessible through the “Help” link found in the upper right corner throughout the OMS. This section serves as a landing page for all of the various resources and support available to OMS users related to the CFSRs, the OMS, and the Children’s Bureau. When clicked, the Help page opens in a separate browser window, so that you may reference resources and support from the Help page while still keeping your location in the OMS.

The Help page identifies categories of problems and directs you to the appropriate resources. On this page, you will find a link to this OMS User Manual and a link to the OMS Technical and Security Requirements document. Below those, you will find a link to Round 3 Resources on the CFSR Information Portal for policy information and instrument concerns, a link to the E-Training Platform (including full CFSR and OMS training modules), a link to the OSRI Frequently Asked Questions where OMS users can submit questions to the Children’s Bureau regarding the OSRI or the mock case that’s available for practice on the E-Training Platform, a link to the OMS Change Log for a list of changes made to the OMS since its launch in January 2015, and a link to the OMS Extensible Markup Language (XML) Materials, which are documents related to the importing of cases to or exporting of cases from the OMS.

The Help page reminds users to contact their state administration with questions about Internet connectivity or hardware requirements, and either their state administration or Children’s Bureau Regional Office to request OMS access. A link to Regional Office contact information is provided.

Finally, the CWRP Help Desk is also available from the Help page. The CWRP Help Desk is a full-service support platform that allows all OMS users to submit technical assistance or support requests directly through the online page via a form or live chat feature, by toll-free telephone call (1-888-667-0855), or by email (cwrp-helpdesk@cfsrportal.org). The CWRP Help Desk is available Monday through Friday, except for federal holidays, between 8 a.m. and 8 p.m. eastern time. All support requests received outside of CWRP Help Desk operating hours will be responded to the next business day.

CWRP Help Desk staff will assist users with any OMS question or issue or will provide the user with the appropriate resources. All technical assistance or support requests made through the CWRP Help Desk are tracked and will be used to improve both the OMS itself and Help Desk support.

Appendix A: CFSR OMS Logic and Validation

This appendix presents three charts to explain the logic and validation embedded in the OMS. Each chart presents information item-by-item and describes features built into the OMS. The first chart is an item-by-item summary of internal logic validations. The second chart is a comprehensive list of every logic validation error message. The third chart is a comprehensive list of every field that is pre-filled and/or disabled using information provided earlier in the instrument.

Logic Summary

Item	Question	Logic Summary
Face Sheet		
	C	Prefilled at review setup for reviews with fixed PUR.
	D	Prefilled for reviewer completing instrument. Other reviewers can be added.
	E	Used in determining whether child has been in care 60 days for validations used in item 5.
	E	Used to validate DOB in table G1.
	E	Used in calculating time in care for questions 5D and 6A2.
	C and E	Used to set PUR that shows on every page, and to validate dates entered in rest of Face Sheet and tables 1A1 and 4A1.
	F	Used in disabling questions (Face Sheet questions J and K; item 2 applicability, questions 2B, 3E1, 3E, 3F1, 3F) and questions related to foster care cases only (items 4-11 and question 12C) for in-home cases and vice versa.
	F	Used to trigger display of child selection lists in items 12A, 13, 16, 17, and 18.
	G1	DOB validated to be less than 18 by date in Face Sheet question E.
	G1	DOB used to validate table 1A1 report date.
	G1	Child names used to populate in-home child selection lists in items 12A, 13, 16, 17, and 18.
	G1	Number of children entered used to determine applicability of item 7, and questions 8E1, 8E, and 8F.
	G2	Participant names used to populate parent selection lists in items 8, 11, 12B, 13, and 15.
	H	Used to validate selections in Face Sheet question M.
	I	Used to validate question 3A as NA.
	J	Used to populate question 6A1.
	J	Used to validate table 4A1 dates.
	K	Used to populate question 6A3.
	L	Used to validate dates entered in tables 1A1 and 4A1.
Item 1		
	Applicability	Must be applicable if either of 2 bullets in question 3D1 or 1 bullet in question 3F1 are checked.
	A1	Number of reports (unique report dates) used to validate questions 1A and 1B.
	A1	Substantiations used to validate bullets in questions 3D1 and 3F1.
	A1	Report dates must be during PUR, before date of case closure, and after DOB.

Item	Question	Logic Summary
	A	Used to validate question 1C as NA.
	B	Used to validate question 1C as NA.
Item 3		
	A	Date in Face Sheet question I is used to validate question 3A as NA.
	D1	Table 1A1 substantiations used to validate 3D1 selections.
	D1	Selections used to validate applicability of item 1.
	D	Validated against question 3D1.
	E	Validated against question 3E1.
	F1	Table 1A1 substantiations used to validate question 3F1 selections.
	F1	Selections used to validate applicability of item 1.
	F	Validated against question 3F1.
Item 4		
	A1	Placement dates must be before end of PUR (Face Sheet question E) and before date of case closure (Face Sheet question L).
	A	Pre-filled based on number of placements entered in table 4A1.
	B	Prefilled NA if only 1 placement entered in table 4A1.
Item 5		
	A1	Goals used to prefill questions 5A2.
	A2	Used to populate question 6A4.
	F	Validated using responses to questions 5D and 5E.
	G1	Validated using response to question 5D.
	G	Validated against question 5G1.
Item 6		
	A1	Populated by Face Sheet question J.
	A2	Populated using the dates in Face Sheet questions J and K or, if there is no date in question K, then Face Sheet questions J and E.
	A3	Populated by Face Sheet question K.
	A4	Populated by question 5A2.
	C1, C2, C	Validated against question 6A4.
Item 7		
	Applicability	Face Sheet table G1 (number of siblings listed) used to determine applicability of item 7.
	A	Used to validate item 8 applicability question 1.
Item 8		
	Applicability	Question 1 validated against question 7A, and used to prefill NA in questions 8E1, 8E, and 8F (if No).
	Applicability	Face Sheet table G2 case participants used to populate parent selections.
	Applicability	Used to NA Mother or Father-related item 8 questions if No to pre-applicability questions.
	A	Validated against question 8A1.
	B	Validated against question 8B1.
	E	Validated against question 8E1.

Item	Question	Logic Summary
	C	Validated against question 8A.
	D	Validated against question 8B.
	F	Validated against question 8E.
	A1, A, C	Prefilled NA if applicability page NA's Mother.
	B1, B, D	Prefilled NA if applicability page NA's Father.
	E1, E, F	Prefilled NA if applicability page NA's sibling questions.
Item 11		
	Applicability	Face Sheet table G2 case participants used to populate parent selections.
	Applicability	Used to NA Mother or Father-related item 11 questions if No to pre-applicability questions.
	A, A1	Prefilled NA if applicability page NA's Mother.
	B, B1	Prefilled NA if applicability page NA's Father.
Item 12A		
	Applicability	Face Sheet table G1 children listed used to populate in-home case child selections.
	A2	Validated against question 12A1.
Item 12B		
	Applicability	Face Sheet table G2 case participants used to populate parent selections.
	Applicability	Used to NA Mother or Father-related item 12B questions if No to pre-applicability questions.
	B1, B3	Prefilled NA if applicability page NA's Mother.
	B2, B4	Prefilled NA if applicability page NA's Father.
Item 12C		
	C2	Validated against question 12C1.
Item 13		
	Applicability	Face Sheet table G1 children listed used to populate in-home case child selections.
	Applicability	Face Sheet table G2 case participants used to populate parent selections.
	Applicability	Used to NA Mother or Father-related item 13 questions if No to pre-applicability questions.
	Applicability	Question 1 used to prefill NA in question 13A.
	A	Prefilled NA if applicability page NA's child(ren).
	B	Prefilled NA if applicability page NA's Mother.
	C	Prefilled NA if applicability page NA's Father.
Item 14		
	A	Validated against question 14A1.
	B	Validated against question 14A.
Item 15		
	Applicability	Face Sheet table G2 case participants used to populate parent selections.
	Applicability	Used to NA Mother or Father-related item 15 questions if No to pre-applicability questions.

Item	Question	Logic Summary
	A1, A2, C	Prefilled NA if applicability page NA's Mother.
	B1, B2, D	Prefilled NA if applicability page NA's Father.
	A2	Validated against question 15A2.
	B2	Validated against question 15B1.
	C	Validated against question 15A2.
	D	Validated against question 15B2.
Item 16		
	Applicability	Face Sheet table G1 children listed used to populate in-home case child selections.
	B	Validated against question 16A.
Item 17		
	Applicability	Face Sheet table G1 children listed used to populate in-home case child selections.
	B2	Validated against question 17A1.
	B3	Validated against question 17A2.
Item 18		
	Applicability	Face Sheet table G1 children listed used to populate in-home case child selections.
	C	Validated against question 18A.

Logic Validation Error Messages

Location	Logic	Logic Validation Error Message
Home: System Use Notification	The OMS cannot be accessed until a user agrees to the terms and conditions (System Use Notification).	Before you can proceed, you must accept the terms and conditions. Please check the box at the bottom of this page.
Home: OSRI Case Elimination	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	The OSRI Case Elimination page contains errors; please scroll to view.
Home: OSRI Case Elimination	A case cannot be eliminated without providing a reason.	Please select a Reason.
Home: OSRI Case Elimination	If "Case should not be in the sample" is selected for Reason Case Eliminated, a reason must be provided in the following narrative field.	Please enter reason case should not be included in the sample.

Location	Logic	Logic Validation Error Message
Home: OSRI Case Elimination	The explanation provided for a case elimination cannot contain proper names.	Please check the box to confirm that the case elimination explanation does not contain proper names.
Face Sheet (Case Setup)	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	The Case Setup page contains errors; please scroll to view.
Face Sheet (Case Setup)	Site (question A) is a required field.	Please select a site.
Face Sheet (Case Setup)	Case name (question B) is a required field.	Please specify a case name.
Face Sheet (Case Setup)	PUR start date (question C) is a required field.	Please enter the PUR start date.
Face Sheet (Case Setup)	PUR start date (question C) cannot begin in the future.	Please enter a PUR start date that is not a future date.
Face Sheet (Case Setup)	Reviewer name (question D) is a required field.	Please specify the reviewer name(s).
Face Sheet (Case Setup)	The same person cannot be assigned to multiple roles.	Please do not assign a user to more than one role (Reviewer, Initial QA, Second Level QA, or Secondary Oversight).
Face Sheet (Case Setup)	Reviewers can only be assigned to a case created within a site for which the Reviewer has access.	Please select Reviewer(s) associated with the site selected in question A.
Face Sheet (Case Setup)	Site Leaders can only be assigned to a case created within a site for which the Site Leader has access.	Please select Initial QA staff associated with the site selected in question A.
Face Sheet (Case Setup)	Site Leaders can only be assigned to a case created within a site for which the Site Leader has access.	Please select Second Level QA staff associated with the site selected in question A.
Face Sheet (Case Setup)	Site Leaders can only be assigned to a case created within a site for which the Site Leader has access.	Please select Secondary Oversight staff associated with the site selected in question A.
Face Sheet (Case Setup)	Date case review was completed (question E) is a required field.	Please specify the date case review was completed.
Face Sheet (Case Setup)	Date case review was completed (question E) must be after the PUR start date.	Please enter a date the case review was completed that is after the date in question C.
Face Sheet (Case Setup)	Date case review was completed (question E) cannot be more than 1 year out from the current date.	Please verify that the date is accurate.
Face Sheet (Case Setup)	Case type (question F) is a required field.	Please select type of case.
Face Sheet	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	The Face Sheet contains errors; please scroll to view.

Location	Logic	Logic Validation Error Message
Face Sheet G1 table	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Table G1 contains errors; please scroll to view.
Face Sheet G1 table	Child's Name is a required field.	Please specify the child's name.
Face Sheet G1 table	Race is a required field.	Please select race.
Face Sheet G1 table	Ethnicity is a required field.	Please select ethnicity.
Face Sheet G1 table	Date of Birth is a required field.	Please specify date of birth.
Face Sheet G1 table	Gender is a required field.	Please select gender.
Face Sheet G1 table	At least one child must be entered into table G1.	For table G1, you have not entered any children. Please enter at least one child.
Face Sheet G1 table	A target child should be marked for foster care cases, even if there is only one child.	For table G1, you have not selected a target child. Please select a target child.
Face Sheet G1 table	Only one child can be marked as the target child in table G1.	For table G1, you entered more than one target child. Please ensure that only one child has been identified as the target child.
Face Sheet G1 table	The date of birth entered cannot result in the child being over 18 on the first day of the PUR (Face Sheet question C).	The date of birth you have entered indicates that the child is over 18. Please ensure that this date is correct. Cases involving children over the age of 18 at the beginning of the PUR are not eligible for assessment.
Face Sheet G1 table	The table is required before the remaining questions can be answered.	Please complete the table before answering questions for the Face Sheet.
Face Sheet G1 table	When navigating back to the Face Sheet after completing other items, validation will re-run on existing table G1 data.	Please review the data entered in each row of table G1, because an error has been identified. Please click on the child's name to review each row.
Face Sheet G1 table	If there is only one row saved to table G1, that row can be edited but not deleted.	This row cannot be deleted from table G1. Please click on the child's name to edit.
Face Sheet G1 table	A row cannot be deleted from table G1 if the child is already referenced in item 1 table 1A1.	Child cannot be deleted because this child is referenced in item 1 table 1A1.
Face Sheet G1 table	A row cannot be deleted from table G1 if the child is already referenced in the item 12A applicability page.	Child cannot be deleted because this child is referenced in case applicability for sub-item 12A.
Face Sheet G1 table	A row cannot be deleted from table G1 if the child is already referenced in the item 13 applicability page.	Child cannot be deleted because this child is referenced in case applicability for item 13.
Face Sheet G1 table	A row cannot be deleted from table G1 if the child is already referenced in the item 16 applicability page.	Child cannot be deleted because this child is referenced in case applicability for item 16.
Face Sheet G1 table	A row cannot be deleted from table G1 if the child is already referenced in the item 17 applicability page.	Child cannot be deleted because this child is referenced in case applicability for item 17.
Face Sheet G1 table	A row cannot be deleted from table G1 if the child is already referenced in the item 18 applicability page.	Child cannot be deleted because this child is referenced in case applicability for item 18.

Location	Logic	Logic Validation Error Message
Face Sheet G1 table	A row cannot be deleted from table G1 if the child is already referenced in rating item 7.	Child cannot be deleted because this child is considered in rating item 7.
Face Sheet G1 table	A row cannot be deleted from table G1 if the child is already referenced in rating item 8.	Child cannot be deleted because this child is considered in rating item 8.
Face Sheet G2 table	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Table G2 contains errors; please scroll to view.
Face Sheet G2 table	At least one participant must be entered into table G2.	For table G2, you have not entered any participants. Please enter at least one participant.
Face Sheet G2 table	If the Participant's Role is Other, the following narrative field is required.	Please fill out the Participant's Role narrative field for a response of Other.
Face Sheet G2 table	The table is required before the remaining questions can be answered.	Please complete the table before answering questions for the Face Sheet.
Face Sheet G2 table	Participant's Name is a required field.	Please specify the Participant's Name.
Face Sheet G2 table	Participant's Role is a required field.	Please specify the Participant's Role.
Face Sheet G2 table	Relationship to Child is a required field.	Please specify the Relationship to Child.
Face Sheet G2 table	When navigating back to the Face Sheet after completing other items, validation will re-run on existing table G2 data.	Please review the data entered in each row of table G2, because an error has been identified. Please click on the participant's name to review each row.
Face Sheet G2 table	Narrative text cannot be saved unless Participant's Role is Other.	You did not answer Other to Participant's Role and entered narrative to explain the answer that is not required. Please remove narrative from this field.
Face Sheet G2 table	If there is only one row saved to table G2, that row can be edited but not deleted.	This row cannot be deleted from table G2. Please click on the participant's name to edit.
Face Sheet G2 table	A row cannot be deleted from table G2 if the participant is already referenced in the item 8 applicability page.	Participant cannot be deleted because this participant is referenced in case applicability for item 8.
Face Sheet G2 table	A row cannot be deleted from table G2 if the participant is already referenced in the item 11 applicability page.	Participant cannot be deleted because this participant is referenced in case applicability for item 11.
Face Sheet G2 table	A row cannot be deleted from table G2 if the participant is already referenced in the item 12B applicability page.	Participant cannot be deleted because this participant is referenced in case applicability for item 12B.
Face Sheet G2 table	A row cannot be deleted from table G2 if the participant is already referenced in the item 13 applicability page.	Participant cannot be deleted because this participant is referenced in case applicability for item 13.
Face Sheet G2 table	A row cannot be deleted from table G2 if the participant is already referenced in the item 15 applicability page.	Participant cannot be deleted because this participant is referenced in case applicability for item 15.
Face Sheet G2 table	Participant's Role cannot be changed from Mother/Father/Other if the participant is already referenced in case applicability for item 8.	Participant's Role cannot be changed because this participant is referenced in case applicability for item 8.

Location	Logic	Logic Validation Error Message
Face Sheet G2 table	Participant's Role cannot be changed from Mother/Father/Other if the participant is already referenced in case applicability for item 11.	Participant's Role cannot be changed because this participant is referenced in case applicability for item 11.
Face Sheet G2 table	Participant's Role cannot be changed from Mother/Father/Other if the participant is already referenced in case applicability for item 12B.	Participant's Role cannot be changed because this participant is referenced in case applicability for item 12B.
Face Sheet G2 table	Participant's Role cannot be changed from Mother/Father/Other if the participant is already referenced in case applicability for item 13.	Participant's Role cannot be changed because this participant is referenced in case applicability for item 13.
Face Sheet G2 table	Participant's Role cannot be changed from Mother/Father/Other if the participant is already referenced in case applicability for item 15.	Participant's Role cannot be changed because this participant is referenced in case applicability for item 15.
Face Sheet H	Question H is a required field.	Please answer question H.
Face Sheet I	The date of the first case opening in question I must be before the last day of the PUR.	For question I, please enter a date of case opening that is before the last day of the PUR.
Face Sheet J	Question J: Date cannot be later than the final date of the PUR (question C).	For question J, please enter a date for the target child’s most recent entry into foster care that is before the last day of the PUR.
Face Sheet J	Question J: Date cannot be before the date of case opening (question I).	For question J, please enter a date that is on or after the date of case opening recorded in question I.
Face Sheet J	The date of target child's most recent entry into foster care (question J) cannot be earlier than the child's date of birth.	For question J, please enter a date for the target child’s most recent entry into foster care that is on or after the date of birth of the target child.
Face Sheet J	Question J is a required field.	For question J, please enter the date of the child's most recent entry into foster care.
Face Sheet J	Question J cannot save both a date and "NA".	For question J, please either specify a date or choose NA.
Face Sheet K	Question K is a required field.	Please answer question K.
Face Sheet K	For foster care cases only, date of discharge from foster care (question K) cannot be NA.	For question K, please enter a date of discharge or select Not Yet Discharged since this is a foster care case.
Face Sheet K	For foster care cases only, the date of discharge (question K) is a required field if the date of case closure is entered in question L.	For question K, if case is closed, please enter discharge date.
Face Sheet K	For foster care cases only, the date of discharge (question K) cannot be after the last day of the PUR (question E).	For question K, please enter a date of discharge that is on or before the last day of the PUR.
Face Sheet K	For foster care cases, the date of discharge from foster care (question K) must be after the child's most recent entry into foster care (question J).	For question K, please enter a date of discharge that is after the target child’s most recent entry into foster care.

Location	Logic	Logic Validation Error Message
Face Sheet K	For foster care cases, the date of discharge from foster care (question K) must be after the child's date of birth.	For question K, please enter a date of discharge that is after the date of birth of the target child.
Face Sheet K	Question K cannot save both a date and one of the other two options.	For question K, please either specify a date or choose NA or Not Yet Discharged.
Face Sheet K	Question K cannot save both NA and Not Yet Discharged.	For question K, please choose NA or Not Yet Discharged, but not both.
Face Sheet L	The date of the most recent case closure in question L cannot be before the date of the child's most recent entry into foster care in question J.	For question L, please enter the date of the most recent case closure that is after the target child's most recent entry into foster care.
Face Sheet L	For foster care cases only, if question K is Not Yet Discharged, question L must be Case not closed by time of review.	For question L, please select Case not closed by time of review since question K is Not Yet Discharged.
Face Sheet L	The date of the most recent case closure (question L) must be on or before the last day of the PUR (question E).	For question L, please enter the date of the most recent case closure that is on or before the last day of the PUR.
Face Sheet L	The date of the most recent case closure (question L) must be on or after the first day of the PUR (question C).	For question L, please enter the date of the most recent case closure that is on or after the first day of the PUR.
Face Sheet L	For non-foster care cases, the date of the most recent case closure (question L) cannot be on or before the date the case was opened for services during the PUR (question I).	For question L, please enter the date of the most recent case closure that is after the date the case was opened for services during the PUR.
Face Sheet L	For foster care cases only, the date of the most recent case closure (question L) must be after the date of birth of the target child (if a date of birth is entered).	For question L, please enter the date of the most recent case closure that is after the date of birth of the target child.
Face Sheet L	Question L cannot save both a date and "Case not closed by time of review".	For question L, please either specify a date or choose Case not closed by time of review.
Face Sheet L	Question L is a required field.	Please answer question L.
Face Sheet M	Question M is a required field.	Please answer question M.
Face Sheet M	If question M is Other, the following narrative field is required.	For question M, please fill out the narrative field for a response of Other.
Face Sheet M	Narrative text cannot be saved unless Face Sheet question M is Other.	You did not answer Other to question M and entered narrative to explain the answer that is not required. Please remove narrative from this field.
Item 1 applicability	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 1 contains errors; please scroll to view.
Item 1 applicability	Item 1 applicability is a required field.	Please select Yes or No.
Item 1	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 1 contains errors; please scroll to view.
Item 1	The table is required before the remaining questions can be answered.	Please complete the table before answering questions for this item.

Location	Logic	Logic Validation Error Message
Item 1	Item 1 cannot be saved without first saving information to table 1A1.	You have not completed table 1A1. Please complete table 1A1.
Item 1	If there is only one row saved to table 1A1, that row can be edited but not deleted.	This row cannot be deleted from table 1A1. Please click on the report date to edit.
Item 1	When navigating back to item 1 after completing other items, validation will re-run on existing table 1A1 data.	Please review the data entered in each row of table 1A1, because an error has been identified. Please click on the report date to review each row.
Item 1	If a substantiated or indicated maltreatment report is checked in question 3D1, the item 1 page cannot then be saved with no substantiated or indicated reports in table 1A1.	You indicated in question 3D1 that there was a substantiated or indicated maltreatment report. Please compare the information you have in table 1A1 to ensure that you selected substantiated or indicated for the disposition of a report during the PUR.
Item 1	If a substantiated or indicated maltreatment report is checked in question 3D1, item 1 cannot then be saved as NA.	You indicated in question 3D1 that there were maltreatment reports during the PUR. Please change your answers to question 3D1 or mark item 1 as applicable.
Item 1	If a substantiated or indicated maltreatment report is checked in question 3F1, item 1 cannot then be saved as NA.	You indicated in question 3F1 that there were maltreatment reports during the PUR. Please change your answers to question 3F1 or mark item 1 as applicable.
Item 1A1 table	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 1 table contains errors; please scroll to view.
Item 1A1 table	Report Date must be during the PUR.	Please enter a report date that is during the PUR.
Item 1A1 table	Date Assigned for an Investigation or Assessment is a required field.	Please select either a date or Did not occur.
Item 1A1 table	Date Investigation or Assessment Initiated is a required field.	Please select either a date or Did not occur.
Item 1A1 table	Date of Face-to-Face Contact With Child is a required field.	Please select either a date or Did not occur.
Item 1A1 table	Date Assigned for an Investigation must be during the PUR.	Please enter a date assigned for investigation that is during the PUR.
Item 1A1 table	Date Investigation or Assessment Initiated must be during the PUR.	Please enter a date investigation or assessment was initiated that is during the PUR.
Item 1A1 table	Date of Face-to-Face Contact With Child must be during the PUR.	Please enter a date of face-to-face contact that is during the PUR.
Item 1A1 table	Date Assigned for an Investigation or Assessment cannot be earlier than the Report Date.	Please enter a date assigned for investigation that is on or after the report date.
Item 1A1 table	Date Investigation or Assessment Initiated cannot be earlier than the Report Date.	Please enter a date investigation or assessment was initiated that is on or after the report date.
Item 1A1 table	Date Investigation or Assessment Initiated cannot be earlier than the Date Assigned for an Investigation or Assessment.	Please enter a date investigation or assessment was initiated that is on or after the date assigned for investigation.

Location	Logic	Logic Validation Error Message
Item 1A1 table	Date of Face-to-Face Contact With Child cannot be earlier than the date assigned.	Please enter a date of face-to-face contact that is on or after the date investigation or assessment was initiated.
Item 1A1 table	Name of Child is a required field.	You have not selected the child. Please select a child who was the subject of the report.
Item 1A1 table	Allegation is a required field.	You have not selected an Allegation. Please select an Allegation for this report.
Item 1A1 table	If Other is selected as the Allegation, the corresponding Other narrative is a required field.	For Allegation, please fill out the narrative field for a response of Other.
Item 1A1 table	Text cannot be saved to the Allegation (Other) narrative field, unless Other is checked as the Allegation.	You did not answer Other to Allegation and entered narrative to explain the answer that is not required. Please remove narrative from this field.
Item 1A1 table	Assessment or Investigation is a required field.	You have not selected Assessment or Investigation. Please select Assessment or Investigation for this report.
Item 1A1 table	Relationship of Alleged Perpetrator to Child is a required field.	You have not selected the Relationship of Alleged Perpetrator to Child. Please select the Relationship of Alleged Perpetrator to Child for this report.
Item 1A1 table	If Other is selected as the Relationship of Alleged Perpetrator to Child, the corresponding Other narrative is a required field.	For Relationship of Alleged Perpetrator to Child, please fill out the narrative field for a response of Other.
Item 1A1 table	Disposition is a required field.	You have not selected the Disposition. Please select the Disposition of this report.
Item 1A1 table	Duplicate rows with the same child, report date, allegation, relationship of alleged perpetrator, and disposition are not allowed in table 1A1.	You have entered two rows with the same child, report date, allegation, relationship of alleged perpetrator, and disposition. Please change the data or return to item 1.
Item 1A1 table	Narrative text cannot be saved unless Allegation is Other.	You did not answer Other to Allegation and entered narrative to explain the answer that is not required. Please remove narrative from this field.
Item 1A1 table	Narrative text cannot be saved unless Relationship of Alleged Perpetrator to Child is Other.	You did not answer Other to Relationship of Alleged Perpetrator to Child and entered narrative to explain the answer that is not required. Please remove narrative from this field."
Item 1A	Question 1A is a required field and must be numeric.	For question 1A, please enter a number.
Item 1A	Question 1A cannot exceed the number of reports in table 1A1.	Please enter a number equal to or less than the number of reports in table 1A1.
Item 1B	Question 1B is a required field and must be numeric.	For question 1B, please enter a number.
Item 1B	Question 1B cannot exceed the number of reports in table 1A1.	Please enter a number equal to or less than the number of reports in table 1A1.
Item 1B	If either question 1A or 1B is greater than zero, the following narrative field is required.	Please fill out the narrative field if question 1A or 1B is greater than zero.

Location	Logic	Logic Validation Error Message
Item 1B	If questions 1A and 1B are both either blank or zero, no text can be saved in the following narrative field (i.e. either question 1A or 1B must be greater than zero for the narrative field to be applicable).	You have not entered a number greater than zero for question 1A or 1B and have entered a narrative explanation that was not required. Please remove the narrative explanation. Please provide any additional comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 1C	If questions 1A and 1B are both zero, question 1C must be NA.	For question 1C, please select NA since both questions 1A and 1B are zero.
Item 1C	Question 1C cannot be NA if questions 1A or 1B are greater than zero.	For question 1C, please select Yes or No since delays related to reports are indicated in question 1A or 1B.
Item 1 rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 2 applicability	All pre-applicability questions must be answered.	Please answer all questions on this page.
Item 2 applicability	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 2 contains errors; please scroll to view.
Item 2 applicability	Item 2 applicability is a required field.	Please select Yes or No.
Item 2 applicability	If any of the first five pre-applicability bullets are Yes (but the sixth pre-applicability bullet is No), item 2 applicability must be Yes.	The answers above indicate that this case is applicable. Please review answers above.
Item 2 applicability	If any of the first five pre-applicability bullets are Yes (and the sixth pre-applicability bullet is Yes), item 2 applicability must be No.	The answers above indicate that this case is not applicable. Please review answers above.
Item 2 applicability	If the first five pre-applicability bullets are No (but the sixth pre-applicability bullet is Yes), item 2 applicability must be No.	The answers above indicate that this case is not applicable. Please review answers above.
Item 2 applicability	If all six pre-applicability bullets are No, item 2 applicability must be No.	The answers above indicate that this case is not applicable. Please review answers above.
Item 2	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 2 contains errors; please scroll to view.
Item 2A	If question 2A is No, the following narrative field is required.	For question 2A, please fill out the narrative field for a response of No.
Item 2A narrative	Narrative text cannot be saved unless question 2A is No.	You did not answer No to question 2A and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.

Location	Logic	Logic Validation Error Message
Item 2B	Question 2B cannot be No if question 2A is Yes.	The answer to question 2B cannot be No if the answer to question 2A is Yes. Please review your answers and refer to the instructions for guidance.
Item 2B	If question 2B is No, the following narrative field is required.	For question 2B, please fill out the narrative field for a response of No.
Item 2B narrative	Narrative text cannot be saved unless question 2B is No.	You did not answer No to question 2B and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 2 rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 3	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 3 contains errors; please scroll to view.
Item 3A	If question 3A is No, the following narrative field is required.	For question 3A, please fill out the narrative field for a response of No.
Item 3A	Questions 3A and 3B cannot both be NA.	Please change question 3A or 3B so that both are not NA.
Item 3A narrative	Narrative text cannot be saved unless question 3A is No.	You did not answer No to question 3A and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 3B	If question 3B is No, the following narrative field is required.	For question 3B, please fill out the narrative field for a response of No.
Item 3B narrative	Narrative text cannot be saved unless question 3B is No.	You did not answer No to question 3B and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 3C	If question 3C is No, the following narrative field is required.	For question 3C, please fill out the narrative field for a response of No.

Location	Logic	Logic Validation Error Message
Item 3C narrative	Narrative text cannot be saved unless question 3C is No.	You did not answer No to question 3C and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 3D1	If question 3D1 is Other, the following narrative field is required.	For question 3D1, please fill out the narrative field for a response of Other.
Item 3D1	If question 3D1 is "No safety-related incidents…" then no other selections can be made.	For question 3D1, if you have selected "No safety-related incidents occurred that were not adequately addressed by the agency", please ensure that no other selections were made.
Item 3D1	If question 3D1 is NA, no other selections can be made.	For question 3D1, if you have selected NA, please ensure that no other selections were made.
Item 3D1	Narrative text cannot be saved unless question 3D1 is Other.	You did not answer Other to question 3D1 and entered narrative to explain the answer that is not required. Please remove narrative from this field."
Item 3D	If NA is checked in question 3D1, then question 3D must be NA.	For question 3D, please select NA since NA is selected in question 3D1.
Item 3D	Question 3D cannot be No or NA if there is a safety-related incident identified in question 3D1.	For question 3D, please select Yes since safety-related incidents were identified in question 3D1.
Item 3D	If no safety-related incidents are identified in question 3D1, question 3D cannot be Yes.	For question 3D, please select Yes only if a safety concern was identified in question 3D1.
Item 3E1	If question 3E1 is Other, the following narrative field is required.	For question 3E1, please fill out the narrative field for a response of Other.
Item 3E1	If question 3E1 is No safety concerns, no other selections are allowed.	For question 3E1, if you have selected "No safety concerns related to visitation were present", please ensure that no other selections were made.
Item 3E1	If question 3E1 is NA, no other selections are allowed.	For question 3E1, if you have selected NA, please ensure that no other selections were made.
Item 3E1	Narrative text cannot be saved unless question 3E1 is Other.	You did not answer Other to question 3E1 and entered narrative to explain the answer that is not required. Please remove narrative from this field."
Item 3E	Question 3E cannot be No or NA if there are safety concerns identified in question 3E1.	For question 3E, please select Yes since safety concerns were identified in question 3E1.
Item 3E	If no safety-related incidents are identified in question 3E1, question 3E cannot be Yes.	For question 3E, please select Yes only if a safety concern was identified in question 3E1.
Item 3F1	Question 3F1 cannot be NA for foster care cases.	For question 3F1, please select a response other than NA because this is a foster care case.

Location	Logic	Logic Validation Error Message
Item 3F1	If question 3F1 is Other, the following narrative field is required.	For question 3F1, please fill out the narrative field for a response of Other.
Item 3F1	If question 3F1 is No concerns existed, no other selections are allowed.	For question 3F1, if you have selected "No concerns existed for the target child while in foster care placement that were not adequately addressed", please ensure that no other selections were made.
Item 3F1	Narrative text cannot be saved unless question 3F1 is Other.	You did not answer Other to question 3F1 and entered narrative to explain the answer that is not required. Please remove narrative from this field."
Item 3F	For foster care cases only, question 3F cannot be NA.	For question 3F, please select Yes or No since this is a foster care case.
Item 3F	If concerns are identified in question 3F1, then question 3F must be Yes.	For question 3F, please select Yes since concerns were identified in question 3F1.
Item 3F	If question 3F1 is No concerns, NA, or blank, question 3F cannot be Yes.	For question 3F, please select Yes only if a safety concern was identified in question 3F1.
Item 3 rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 4	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 4 contains errors; please scroll to view.
Item 4A1 table	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 4 table contains errors; please scroll to view.
Item 4A1 table	Placement Date is a required field.	You have not selected a placement date. Please select a placement date.
Item 4A1 table	Placement Type is a required field.	You have not selected a placement type. Please select a placement type.
Item 4A1 table	Reason for Change in Placement Setting is a required field.	Please enter a Reason for Change or indicate that this is the current or most recent placement.
Item 4A1 table	If Other is selected as the Reason for Change in Placement Setting, the corresponding Other narrative is a required field.	For Reason for Change in Placement Setting, please fill out the narrative field for a response of Other.
Item 4A1 table	When saving item 4, the last row in table 4A1 cannot have a Reason for Change in Placement Setting, but rather should indicate that this is the current or most recent placement.	The last row in table 4A1 should reflect the child's current or most recent placement and therefore should not show a reason it has changed. Please indicate that this is the current or most recent placement in the Reason for Change in Placement Setting field or, if this is not the current or most recent placement, enter a new row and indicate the current or most recent placement there.
Item 4A1 table	When saving item 4, only one placement in table 4A1 can be listed as the current or most recent placement.	Table 4A1 shows more than one placement as the current or most recent placement. Please enter a reason for change for all but the current or most recent placement.

Location	Logic	Logic Validation Error Message
Item 4A1 table	None of the placement dates in table 4A1 should be before the target child's date of birth (Face Sheet table G1).	Please enter a placement date that is on or after the date of birth of the target child.
Item 4A1 table	If there is a date listed for case closure in Face Sheet question L, the placement date in table 4A1 cannot be on or after that date.	Please enter a placement date that is before the date of case closure listed in Face Sheet question L.
Item 4A1 table	If there is no date listed for case closure in Face Sheet question L, the placement date in table 4A1 must be before the end of the PUR.	Please enter a placement date that is before the end of the PUR.
Item 4A1 table	When navigating back to item 4 after completing other items, validation will re-run on existing table 4A1 data.	Please review the data entered in each row of table 4A1, because an error has been identified. Please click on the placement date to review each row.
Item 4A1 table	Narrative text cannot be saved unless Reason for Change in Placement Setting is Other.	You did not answer Other to Reason for Change in Placement Setting and entered narrative to explain the answer that is not required. Please remove narrative from this field.
Item 4A	Question 4A will only accept numeric values.	For question 4A, please enter a number.
Item 4B	If there is only one placement listed in question 4A, then question 4B must be NA.	For question 4B, please select NA since there was only one placement indicated in question 4A.
Item 4B	If there is more than one placement listed in question 4A, then question 4B cannot be NA.	For question 4B, please select Yes or No since there was more than one placement indicated in question 4A.
Item 4C1	If question 4C1 is Other, the following narrative field is required.	For question 4C1, please fill out the narrative field for a response of Other.
Item 4C1	If question 4C1 is "None apply, placement is stable", no other selections are possible.	For question 4C1, if you have selected "None apply, placement is stable", please ensure that no other selections were made.
Item 4C1	Narrative text cannot be saved unless question 4C1 is Other.	You did not answer Other to question 4C1 and entered narrative to explain the answer that is not required. Please remove narrative from this field.
Item 4C	If any of the question 4C1 boxes are checked (except for "None apply, placement is stable"), then question 4C must be No.	For question 4C, please select No since case circumstances were identified in question 4C1.
Item 4C	If "None apply, placement is stable" is checked in question 4C1, then question 4C must be Yes.	For question 4C, please select Yes since "None apply, placement is stable" is selected in question 4C1.
Item 4 rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 5 applicability	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 5 contains errors; please scroll to view.
Item 5 applicability	Item 5 applicability is a required field.	Please select Yes or No.

Location	Logic	Logic Validation Error Message
Item 5 applicability	If a date is selected in Face Sheet question K, use the dates in Face Sheet questions J and K to determine if the child has been in foster care for 61 days or longer. If so, item 5 applicability must be Yes.	You indicated on the Face Sheet that the child has been in foster care more than 60 days. Please answer Yes to the question of applicability for item 5.
Item 5 applicability	If a date is not selected in Face Sheet question K, use the dates in Face Sheet questions J and E to determine if the child has been in foster care for 61 days or longer. If so, item 5 applicability must be Yes.	You indicated on the Face Sheet that the child has been in foster care more than 60 days. Please answer Yes to the question of applicability for item 5.
Item 5	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 5 contains errors; please scroll to view.
Item 5	Table 5A1 is required before the item 5 page can be saved.	You have not completed table 5A1. Please complete table 5A1.
Item 5A1 table	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 5 table contains errors; please scroll to view.
Item 5A1 table	Time in Foster Care Before Goal Established will only accept numeric values.	Please enter a numeric value.
Item 5A1 table	Permanency Goal is a required field.	You have not selected a Permanency Goal. Please select a Permanency Goal.
Item 5A1 table	Date Established is a required field and cannot be after the last day of the PUR.	Please enter a date the goal was established that is on or before the last day of the PUR.
Item 5A1 table	Date Established must be on or after the target child's date of birth.	Please enter a date the goal was established that is on or after the date of birth of the target child.
Item 5A1 table	Date Goal Change is a required field when Reason for Goal Change is entered.	You have entered a Reason For Goal Change without a date the goal changed. Please enter a date the goal changed.
Item 5A1 table	Date Goal Changed must indicate either a date or that the goal indicated is/was the current goal.	Please select either a date or NA. This is/was the current goal.
Item 5A1 table	A Reason for Goal Change should not be entered if Date Goal Change is "NA. This is/was the current goal."	Please do not enter a Reason for Goal Change if you have selected NA. This is/was the current goal.
Item 5A1 table	The date a goal was changed must be on or after the target child's date of birth.	Please enter a date the goal changed that is after the date of birth of the target child.
Item 5A1 table	The date a goal was changed cannot be later than the last day of the PUR.	Please enter a date the goal changed that is before the last day of the PUR.
Item 5A1 table	The date a goal was changed cannot be earlier than the date the goal was established.	Please enter a date the goal changed that is after the date it was established.
Item 5A1 table	The table is required before the remaining questions can be answered.	Please complete the table before answering questions for this item.
Item 5A1 table	When navigating back to item 5 after completing other items, validation will re-run on existing table 5A1 data.	Please review the data entered in each row of table 5A1, because an error has been identified. Please click on the goal to review each row.

Location	Logic	Logic Validation Error Message
Item 5A1 table	If there is only one row saved to table 5A1, that row can be edited but not deleted.	This row cannot be deleted from table 5A1. Please click on the goal to edit.
Item 5A1 table	One of the rows of the table must indicate that it is the current goal.	For table 5A1, please ensure that one of the rows indicates that this is the current goal.
Item 5A1 table	If there are two current goals in table 5A1, they cannot be the same goal.	For table 5A1, please complete Date Goal Changed and Reason for Goal Change for all non-current goals. Please do not list two concurrent goals that are the same.
Item 5A1 table	Non-current goals must indicate the date the goal changed and the reason for change. There can be a maximum of two current goals.	For table 5A1, please complete Date Goal Changed and Reason for Goal Change for all non-current goals. Please record only two concurrent goals.
Item 5A3	If question 5A3 is NA, item 5 is not applicable for assessment.	If question 5A3 is NA, item 5 is not applicable for assessment. Please return to the applicability page for item 5 and select No.
Item 5A3	If a date is selected in Face Sheet question K, use the dates in Face Sheet questions J and K to determine if the child has been in foster care for 61 days or longer. If so, question 5A3 cannot be NA.	You indicated on the Face Sheet that the child has been in foster care more than 60 days. Please answer Yes or No to question 5A3.
Item 5A3	If a date is not selected in Face Sheet question K, use the dates in Face Sheet questions J and E to determine if the child has been in foster care for 61 days or longer. If so, question 5A3 cannot be NA.	You indicated on the Face Sheet that the child has been in foster care more than 60 days. Please answer Yes or No to question 5A3.
Item 5B	If question 5B is NA, item 5 is not applicable for assessment.	If question 5B is NA, item 5 is not applicable for assessment. Please return to the applicability page for item 5 and select No.
Item 5B	If a date is selected in Face Sheet question K, use the dates in Face Sheet question J and K to determine if the child has been in foster care for 61 days or longer. If so, question 5B cannot be NA.	You indicated on the Face Sheet that the child has been in foster care more than 60 days. Please answer Yes or No to question 5B.
Item 5B	If a date is not selected for Face Sheet question K, use the dates in Face Sheet questions J and E to determine if the child has been in foster care for 61 days or longer. If so, question 5B cannot be NA.	You indicated on the Face Sheet that the child has been in foster care more than 60 days. Please answer Yes or No to question 5B.
Item 5B	If question 5B is No, the following narrative field is required.	For question 5B, please fill out the narrative field for a response of No.
Item 5B narrative	Narrative text cannot be saved unless question 5B is No.	You did not answer No to question 5B and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 5C	If question 5C is No, the following narrative field is required.	For question 5C, please fill out the narrative field for a response of No.

Location	Logic	Logic Validation Error Message
Item 5C narrative	Narrative text cannot be saved unless question 5C is No.	You did not answer No to question 5C and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 5E	If question 5D is No, question 5E cannot be NA.	For question 5E, please answer Yes or No since No is selected in question 5D.
Item 5E	If question 5D is Yes, then question 5E is automatically rated NA.	For question 5E, please select NA since Yes is selected in question 5D.
Item 5F	If questions 5D and 5E are No, then question 5F must be NA.	For question 5F, please select NA since No is selected for both questions 5D and 5E.
Item 5G1	If question 5F is Yes, then question 5G1 must be NA.	For question 5G1, please select NA since Yes is selected for question 5F.
Item 5G1	If question 5F is NA, then question 5G1 must be NA.	For question 5G1, please select NA since NA is selected for question 5F.
Item 5G1	If question 5F is No, question 5G1 cannot be NA.	For question 5G1, please do not select NA since the answer to question 5F is No.
Item 5G1	If questions 5D and 5E are No, then question 5G1 must be NA.	For question 5G1, please select NA since No is selected for both questions 5D and 5E.
Item 5G1	No selections can be made in question 5G1 in addition to NA.	For question 5G1, please ensure that no other selections are made in addition to NA.
Item 5G1	If "No exceptions apply" is selected in question 5G1, no other selections can be made.	For question 5G1, if you have selected "No exceptions apply", please ensure that no other selections were made.
Item 5G	If question 5F is No, question 5G cannot be NA.	For question 5G, please select Yes or No since the answer to question 5F is No.
Item 5G	If "exceptions" are selected in question 5G1, question 5G must be Yes.	For question 5G, please select Yes since exceptions were selected in question 5G1.
Item 5G	If question 5G1 is NA, question 5G cannot be Yes.	For question 5G, please do not select Yes since question 5G1 was answered NA.
Item 5G	If question 5F is Yes, then question 5G must be NA.	For question 5G, please select NA since Yes is selected for question 5F.
Item 5G	If question 5F is NA, then question 5G must be NA.	For question 5G, please select NA since NA is selected for question 5F.
Item 5 rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 6	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 6 contains errors; please scroll to view.
Item 6B	Question 6B must be NA if the only goal shown in question 6A4 is OPPLA.	Please select NA for question 6B, since OPPLA is the only goal selected in question 6A4.

Location	Logic	Logic Validation Error Message
Item 6B	Question 6B cannot be NA if OPPLA is not selected in A4.	Please select Yes or No for question 6B, since OPPLA was not selected as a goal in question 6A4.
Item 6B	If question 6B is No, the following narrative field is required.	For question 6B, please fill out the narrative field for a response of No.
Item 6B narrative	Narrative text cannot be saved unless question 6B is No.	You did not answer No to question 6B and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 6C1	Question 6C1 cannot be NA if OPPLA is selected as the goal (or one of the goals) in question 6A4. Exception: Question 6C1 can be NA if OPPLA is one of two goals and question 6B is Yes.	For question 6C1, please select an answer other than NA since OPPLA was selected as a goal in question 6A4.
Item 6C1	Question 6C1 must be NA if OPPLA is not selected as the goal (or one of the goals) in question 6A4.	For question 6C1, please select NA since OPPLA was not selected as a goal in question 6A4.
Item 6C1	Narrative text cannot be saved unless question 6C1 is Other.	You did not answer Other to question 6C1 and entered narrative to explain the answer that is not required. Please remove narrative from this field."
Item 6C2	Question 6C2 cannot be NA if OPPLA is selected as the goal (or one of the goals) in question 6A4. Exception: Question 6C2 can be NA if OPPPLA is one of two goals and question 6B is Yes.	For question 6C2, please select an answer other than NA since OPPLA was selected as a goal in question 6A4.
Item 6C2	Question 6C2 must be NA if OPPLA is not selected as the goal (or one of the goals) in question 6A4.	For question 6C2, please select NA since OPPLA was not selected as a goal in question 6A4.
Item 6C2	The date entered in question 6C2 cannot be before the date of birth of the child (Face Sheet table G1).	For question 6C2, please enter a date that is after the child's date of birth.
Item 6C2	The date entered in question 6C2 cannot be after the PUR.	For question 6C2, please enter a date that is on or before the last day of the PUR.
Item 6C2	Question 6C2 cannot be No Date and have a date entered.	For question 6C2, please either specify a date or choose No Date.
Item 6C2	Question 6C2 cannot be both NA and No Date.	For question 6C2, please choose NA or No Date, but not both.
Item 6C	If there are two goals stated in question 6A4 and one goal is OPPLA, questions 6B and 6C cannot both be Yes, or a combination of Yes and No.	If concurrent goals are in place and one of the goals has been, or will likely be, achieved in a timely manner, answer question 6B or 6C based on the goal that has been or will be achieved and answer the other question as NA.

Location	Logic	Logic Validation Error Message
Item 6C	Question 6C cannot be NA if OPPLA is selected as the goal (or one of the goals) in question 6A4. Exception: Question 6C can be NA if OPPLA is one of two goals and question 6B is Yes.	For question 6C, please select an answer other than NA since OPPLA was selected as a goal in question 6A4.
Item 6C	Question 6C must be NA if OPPLA is not selected as the goal (or one of the goals) in question 6A4.	For question 6C, please select NA since OPPLA was not selected as a goal in question 6A4.
Item 6C	If question 6C is No, the following narrative field is required.	For question 6C, please fill out the narrative field for a response of No.
Item 6C narrative	Narrative text cannot be saved unless question 6C is No.	You did not answer No to question 6C and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 6 rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 7	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 7 contains errors; please scroll to view.
Item 7B	If question 7A is Yes, then question 7B must be NA.	For question 7B, please select NA since Yes is selected in question 7A.
Item 7B	If question 7A is No, then question 7B cannot be NA.	For question 7B, please select Yes or No since No is selected in question 7A.
Item 7B	If question 7B is No, the following narrative field is required.	For question 7B, please fill out the narrative field for a response of No.
Item 7B narrative	Narrative text cannot be saved unless question 7B is No.	You did not answer No to question 7B and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 7 rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 8 applicability	All pre-applicability questions must be answered.	Please answer all questions on this page.
Item 8 applicability	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 8 contains errors; please scroll to view.
Item 8 applicability	Item 8 applicability is a required field.	Please select Yes or No.
Item 8 applicability	If the first pre-applicability bullet is Yes, then item 8 applicability must be Yes.	The answers above indicate that this case is applicable. Please review answers above.

Location	Logic	Logic Validation Error Message
Item 8 applicability	If the first pre-applicability bullet is No and any of the last five pre-applicability bullets are Yes, item 8 applicability must be No.	The answers above indicate that this case is not applicable. Please review answers above.
Item 8 applicability	If all of the six pre-applicability bullets are No, item 8 applicability must be Yes.	The answers above indicate that this case is applicable. Please review answers above.
Item 8 applicability	If there are no entries in Face Sheet table G2 as Mother or Other, a message indicating that no case participants are available for assessment will show on the item 8 applicability page.	There are no case participants in Face Sheet table G2 that can be assessed as Mother.
Item 8 applicability	If there are no entries in Face Sheet table G2 as Father or Other, a message indicating that no case participants are available for assessment will show on the item 8 applicability page.	There are no case participants in Face Sheet table G2 that can be assessed as Father.
Item 8 applicability	If the first pre-applicability bullet is Yes and the remaining five pre-applicability bullets are No, a parent must be selected for assessment.	Please select case participant(s) as Mother and/or Father because you indicated that this case is applicable for an assessment of this item.
Item 8 applicability	If the last five pre-applicability bullets are No and item 8 overall applicability is Yes, at least one parent must be selected for assessment.	Please select case participant(s) as Mother and/or Father because you indicated that this case is applicable for an assessment of this item.
Item 8 applicability	A case participant for Mother cannot be selected if the case is not applicable for Item 8.	Please do not select case participant(s) who are included in this item as Mother because you indicated that this case is not applicable for an assessment of this item.
Item 8 applicability	A case participant for Father cannot be selected if the case is not applicable for Item 8.	Please do not select case participant(s) who are included in this item as Father because you indicated that this case is not applicable for an assessment of this item.
Item 8 applicability	If the first pre-applicability bullet is Yes and any of the last five pre-applicability bullets are Yes, and item 8 applicability is Yes, a Mother cannot be selected for assessment.	Please do not select case participant(s) who are included in this item as Mother because you indicated that parents in this case are not applicable for an assessment of this item.
Item 8 applicability	If the first pre-applicability bullet is Yes and any of the last five pre-applicability bullets are Yes, and item 8 applicability is Yes, a Father cannot be selected for assessment.	Please do not select case participant(s) who are included in this item as Father because you indicated that parents in this case are not applicable for an assessment of this item.
Item 8 applicability	Different case participants must be selected for Mother and Father.	Please select different case participants for Mother and Father.
Item 8 applicability	If question 7A is Yes, the item 8 applicability page's first pre-applicability bullet must be No.	Please answer No to this question since question 7A is Yes.
Item 8 applicability	If question 7A is No, the item 8 applicability page's first pre-applicability bullet must be Yes.	Please answer Yes to this question since question 7A is No.

Location	Logic	Logic Validation Error Message
Item 8	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 8 contains errors; please scroll to view.
Item 8A	If question 8A1 is NA, then question 8A must be NA.	For question 8A, please select NA since NA is selected in question 8A1.
Item 8A	If NA is not selected in question 8A1, then question 8A must be Yes or No.	For question 8A, please select Yes or No since NA is not selected in question 8A1.
Item 8C	If question 8A is NA, then question 8C must be NA.	For question 8C, please select NA since NA is selected in question 8A.
Item 8C	If question 8A1 is Never, question 8C must be NA.	For question 8C, please select NA since Never is selected in question 8A1.
Item 8B	If question 8B1 is NA, then question 8B must be NA.	For question 8B, please select NA since NA is selected in question8B1.
Item 8B	If NA is not selected in question 8B1, then question 8B must be Yes or No.	For question 8B, please select Yes or No since NA is not selected in question 8B1.
Item 8D	If question 8B is NA, then question 8D must be NA.	For question 8D, please select NA since NA is selected in question 8B.
Item 8D	If question 8B1 is Never, question 8D must be NA.	For question 8D, please select NA since Never is selected in question 8B1.
Item 8E	If NA is not selected in question 8E1, then question 8E must be Yes or No.	For question 8E, please select Yes or No since NA is not selected in question 8E1.
Item 8F	If question 8E is NA, then question 8F must be NA.	For question 8F, please select NA since NA is selected in question 8E.
Item 8 rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 9 applicability	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 9 contains errors; please scroll to view.
Item 9 applicability	Item 9 applicability is a required field.	Please select Yes or No.
Item 9	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 9 contains errors; please scroll to view.
Item 9D	If C is NA (not a member of a Tribe), then D is NA.	For question 9D, please select NA since NA is selected in question 9C.
Item 9 rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 10 applicability	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 10 contains errors; please scroll to view.
Item 10 applicability	Item 10 applicability is a required field.	Please select Yes or No.
Item 10	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 10 contains errors; please scroll to view.
Item 10A2	If question 10A1 is No, then question 10A2 must be NA.	For question 10A2, please select NA since No is selected in question 10A1.
Item 10A2	If question 10A1 is Yes, then question 10A2 cannot be NA.	For question 10A2, please select Yes or No since Yes is selected in question 10A1.

Location	Logic	Logic Validation Error Message
Item 10B	The question 10B checkboxes cannot be selected if question 10B is Yes or NA.	Please specify concerns only if your answer to question 10B is No.
Item 10B	If questions 10A1 and 10A2 are both Yes, then question 10B must be NA.	For question 10B, please select NA since Yes is selected in both questions 10A1 and 10A2.
Item 10B	If question 10B is No, at least one of the four checkboxes that follows must be selected.	For question 10B, please specify the area in which concerns existed for a response of No.
Item 10C	The question 10C checkboxes cannot be selected if question 10C is Yes or NA.	Please specify concerns only if your answer to question 10C is No.
Item 10C	If questions 10A1 and 10A2 are both Yes, then question 10C must be NA.	For question 10C, please select NA since Yes is selected in both questions 10A1 and 10A2.
Item 10C	If question 10C is No, at least one of the four checkboxes that follows must be selected.	For question 10C, please specify the area in which concerns existed for a response of No.
Item 10 rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 11 applicability	All pre-applicability questions must be answered.	Please answer all questions on this page.
Item 11 applicability	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 11 contains errors; please scroll to view.
Item 11 applicability	Item 11 applicability is a required field.	Please select Yes or No.
Item 11 applicability	If any of the six pre-applicability bullets are Yes, item 11 applicability must be No.	The answers above indicate that this case is not applicable. Please review answers above.
Item 11 applicability	If all of the six pre-applicability bullets are No, item 11 applicability must be Yes.	The answers above indicate that this case is applicable. Please review answers above.
Item 11 applicability	If there are no entries in Face Sheet table G2 as Mother or Other, a message indicating that no case participants are available for assessment will show on the item 11 applicability page.	There are no case participants in Face Sheet table G2 that can be assessed as Mother.
Item 11 applicability	If there are no entries in Face Sheet table G2 as Father or Other, a message indicating that no case participants are available for assessment will show on the item 11 applicability page.	There are no case participants in Face Sheet table G2 that can be assessed as Father.
Item 11 applicability	If the case is applicable for assessment of item 11, a case participant must be selected for Mother and/or Father.	Please select case participant(s) as Mother and/or Father because you indicated that this case is applicable for an assessment of this item.
Item 11 applicability	A case participant for Mother cannot be selected if the case is not applicable for Item 11.	Please do not select case participant(s) who are included in this item as Mother because you indicated that this case is not applicable for an assessment of this item.
Item 11 applicability	A case participant for Father cannot be selected if the case is not applicable for Item 11.	Please do not select case participant(s) who are included in this item as Father because you indicated that this case is not applicable for an assessment of this item.

Location	Logic	Logic Validation Error Message
Item 11 applicability	Different case participants must be selected for Mother and Father.	Please select different case participants for Mother and Father.
Item 11	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 11 contains errors; please scroll to view.
Item 11A	If Mother was selected on the applicability page, question 11A cannot be NA.	For question 11A, please do not select NA since a case participant was selected as Mother and marked applicable for assessment in this item.
Item 11A1	If question 11A is Yes, question 11A1 cannot be NA.	For question 11A1, please select a response other than NA since question 11A is Yes.
Item 11A1	If question 11A is No, question 11A1 must be NA.	For question 11A1, please select NA since No is selected in question 11A.
Item 11A1	If question 11A1 is Other, the following narrative field is required.	For question 11A1, please fill out the narrative field for a response of Other.
Item 11A1	If question 11A1 is NA, no other selections can be made. If other selections should be made, NA cannot be selected.	For question 11A1, if you have selected NA, please ensure that no other selections were made.
Item 11A1	Narrative text cannot be saved unless question 11A1 is Other.	You did not answer Other to question 11A1 and entered narrative to explain the answer that is not required. Please remove narrative from this field."
Item 11B	If Father was selected on the applicability page, question 11B cannot be NA.	For question 11B, please do not select NA since a case participant was selected as Father and marked applicable for assessment in this item.
Item 11B1	If question 11B is Yes, question 11B1 cannot be NA.	For question 11B1, please select a response other than NA since question 11B is Yes.
Item 11B1	If question 11B1 is No, question 11B must be NA.	For question 11B1, please select NA since No is selected in question 11B.
Item 11B1	If question 11B1 is Other, the following narrative field is required.	For question 11B1, please fill out the narrative field for a response of Other.
Item 11B1	If question 11B1 is NA, no other selections can be made. If other selections should be made, NA cannot be selected.	For question 11B1, if you have selected NA, please ensure that no other selections were made.
Item 11B1	Narrative text cannot be saved unless question 11B1 is Other.	You did not answer Other to question 11B1 and entered narrative to explain the answer that is not required. Please remove narrative from this field."
Item 11 rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 12 rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 12A applicability	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Sub-item 12A contains errors; please scroll to view.
Item 12A applicability	For in-home cases, at least one child must be selected on the sub-item 12A applicability page.	Please indicate the name of at least one child who is included in an assessment of this item.

Location	Logic	Logic Validation Error Message
Item 12A	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Sub-item 12A contains errors; please scroll to view.
Item 12A1	If question 12A1 is No, the following narrative field is required.	For question 12A1, please fill out the narrative field for a response of No.
Item 12A1 narrative	Narrative text cannot be saved unless question 12A1 is No.	You did not answer No to question 12A1 and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 12A2	If question 12A2 is No, the following narrative field is required.	For question 12A2, please fill out the narrative field for a response of No.
Item 12A2 narrative	Narrative text cannot be saved unless question 12A2 is No.	You did not answer No to question 12A2 and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 12A rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 12B applicability	All pre-applicability questions must be answered.	Please answer all questions on this page.
Item 12B applicability	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Sub-item 12B contains errors; please scroll to view.
Item 12B applicability	Sub-item 12B applicability for Mother is a required field.	Please select Yes or No.
Item 12B applicability	Sub-item 12B applicability for Father is a required field.	Please select Yes or No.
Item 12B applicability	If any of the five pre-applicability bullets are Yes, sub-item 12B applicability for Mother and/or Father must be No.	The answers above indicate that this case is not applicable to one or more parent. Please review answers above.
Item 12B applicability	If all of the five pre-applicability bullets are No, sub-item 12B applicability for Mother and/or Father must be Yes.	The answers above indicate that this case is applicable. Please review answers above.
Item 12B applicability	If there are no entries in Face Sheet table G2 as Mother or Other, a message indicating that no case participants are available for assessment will show on the item 12B applicability page.	There are no case participants in Face Sheet table G2 that can be assessed as Mother.
Item 12B applicability	If there are no entries in Face Sheet table G2 as Father or Other, a message indicating that no case participants are available for assessment will show on the item 12B applicability page.	There are no case participants in Face Sheet table G2 that can be assessed as Father.

Location	Logic	Logic Validation Error Message
Item 12B applicability	A case participant for Mother cannot be selected if the case is not applicable for sub-item 12B.	Please do not select case participant(s) who are included in this sub-item as Mother because you indicated that sub-item 12B is not applicable for Mother.
Item 12B applicability	A case participant for Father cannot be selected if the case is not applicable for sub-item 12B.	Please do not select case participant(s) who are included in this sub-item as Father because you indicated that sub-item 12B is not applicable for Father.
Item 12B applicability	If sub-item 12B is applicable for Mother, a case participant must be selected for Mother.	Please select case participant(s) to be included in this sub-item as Mother.
Item 12B applicability	If sub-item 12B is applicable for Father, a case participant must be selected for Father.	Please select case participant(s) to be included in this sub-item as Father.
Item 12B applicability	Different case participants must be selected for Mother and Father.	Please select different case participants for Mother and Father.
Item 12B	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Sub-item 12B contains errors; please scroll to view.
Item 12B1	If Mother was selected on the applicability page, question 12B1 cannot be NA.	For question 12B1, please do not select NA since a case participant was selected as Mother and marked applicable for assessment in this item.
Item 12B1	If question 12B1 is No, the following narrative field is required.	For question 12B1, please fill out the narrative field for a response of No.
Item 12B1 narrative	Narrative text cannot be saved unless question 12B1 is No.	You did not answer No to question 12B1 and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 12B3	If question 12B3 is No, the following narrative field is required.	For question 12B3, please fill out the narrative field for a response of No.
Item 12B3 narrative	Narrative text cannot be saved unless question 12B3 is No.	You did not answer No to question 12B3 and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 12B2	If Father was selected on the applicability page, question 12B2 cannot be NA.	For question 12B2, please do not select NA since a case participant was selected as Father and marked applicable for assessment in this item.
Item 12B2	If question 12B2 is No, the following narrative field is required.	For question 12B2, please fill out the narrative field for a response of No.

Location	Logic	Logic Validation Error Message
Item 12B2 narrative	Narrative text cannot be saved unless question 12B2 is No.	You did not answer No to question 12B2 and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 12B4	If question 12B4 is No, the following narrative field is required.	For question 12B4, please fill out the narrative field for a response of No.
Item 12B4 narrative	Narrative text cannot be saved unless question 12B4 is No.	You did not answer No to question 12B4 and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 12B rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 12C	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Sub-item 12C contains errors; please scroll to view.
Item 12C applicability	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Sub-item 12C contains errors; please scroll to view.
Item 12C applicability	Sub-item 12C applicability is a required field.	Please select Yes or No.
Item 12C1	If question 12C1 is No, the following narrative field is required.	For question 12C1, please fill out the narrative field for a response of No.
Item 12C1 narrative	Narrative text cannot be saved unless question 12C1 is No.	You did not answer No to question 12C1 and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 12C2	If question 12C2 is No, the following narrative field is required.	For question 12C2, please fill out the narrative field for a response of No.
Item 12C2 narrative	Narrative text cannot be saved unless question 12C2 is No.	You did not answer No to question 12C2 and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.

Location	Logic	Logic Validation Error Message
Item 12C rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 13 applicability	All pre-applicability questions must be answered.	Please answer all questions on this page.
Item 13 applicability	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 13 contains errors; please scroll to view.
Item 13 applicability	The first pre-applicability bullet is a required field.	Please select Yes or No.
Item 13 applicability	Item 13 applicability is a required field.	Please select Yes or No.
Item 13 applicability	If the first pre-applicability bullet is Yes and any one of the remaining six pre-applicability bullets is Yes, item 13 applicability must be No.	The answers above indicate that this case is not applicable. Please review answers above.
Item 13 applicability	If the first pre-applicability bullet is No, no matter how the remaining bullets are answered, item 13 applicability must be Yes.	The answers above indicate that this case is applicable. Please review answers above.
Item 13 applicability	If item 13 is applicable and any of the last six pre-applicability bullets are Yes, Mother cannot be selected for assessment.	Please select NA for case participants who are included in this item as Mother because you indicated that this case is not applicable for an assessment of this item.
Item 13 applicability	If item 13 is applicable and any of the last six pre-applicability bullets are Yes, Father cannot be selected for assessment.	Please select NA for case participants who are included in this item as Father because you indicated that this case is not applicable for an assessment of this item.
Item 13 applicability	If all of the last six pre-applicability bullets are No, no matter how the first bullet is answered, item 13 applicability must be Yes.	The answers above indicate that this case is applicable. Please review answers above.
Item 13 applicability	If all of the last six pre-applicability bullets are No and item 13 applicability is Yes, at least one parent must be selected for assessment.	Please select a case participant to be included in this item as Mother or Father.
Item 13 applicability	A case participant for Mother cannot be selected if the case is not applicable for item 13.	Please select NA for case participant(s) who are included in this item as Mother because you indicated that this case is not applicable for an assessment of this item.
Item 13 applicability	A case participant for Father cannot be selected if the case is not applicable for item 13.	Please select NA for case participant(s) who are included in this item as Father because you indicated that this case is not applicable for an assessment of this item.
Item 13 applicability	If item 13 is applicable, a case participant must be selected for Mother or Father.	Please select case participant(s) to be included in this item as Mother or Father.
Item 13 applicability	If there are no entries in Face Sheet table G2 as Mother or Other, a message indicating that no case participants are available for assessment will show on the item 13 applicability page.	There are no case participants in Face Sheet table G2 that can be assessed as Mother.

Location	Logic	Logic Validation Error Message
Item 13 applicability	If there are no entries in Face Sheet table G2 as Father or Other, a message indicating that no case participants are available for assessment will show on the item 13 applicability page.	There are no case participants in Face Sheet table G2 that can be assessed as Father.
Item 13 applicability	Different case participants must be selected for Mother and Father.	Please select different case participants for Mother and Father.
Item 13 applicability	For in-home cases only, if the first pre-applicability bullet is Yes and item 13 is applicable, a child cannot be selected for assessment.	Please do not select a child who is included in an assessment of this item since answers to the questions above indicate that the case is not applicable for assessment of a child.
Item 13 applicability	For in-home cases only, if the first pre-applicability bullet is No and item 13 is applicable, a child must be selected for assessment.	Please indicate the name of at least one child who is included in an assessment of this item.
Item 13	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 13 contains errors; please scroll to view.
Item 13A	If the first pre-applicability bullet is No, item 13 applicability is Yes, but no case participant is selected for either Mother or Father, question 13A cannot be NA.	When question 13A is NA and no case participants are included in this item as Mother or Father, item 13 is not applicable for assessment. Please return to the applicability page for item 13 and select No.
Item 13A	If question 13A is No, the following narrative field is required.	For question 13A, please fill out the narrative field for a response of No.
Item 13A narrative	Narrative text cannot be saved unless question 13A is No.	You did not answer No to question 13A and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 13B	If a case participant was selected for Mother on the applicability page, question 13B cannot be NA.	For question 13B, please do not select NA since a case participant was selected as Mother and marked applicable for assessment in this item.
Item 13B	If question 13B is No, the following narrative field is required.	For question 13B, please fill out the narrative field for a response of No.

Location	Logic	Logic Validation Error Message
Item 13B narrative	Narrative text cannot be saved unless question 13B is No.	You did not answer No to question 13B and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 13C	If a case participant was selected for Father on the applicability page, question 13C cannot be NA.	For question 13C, please do not select NA since a case participant was selected as Father and marked applicable for assessment in this item.
Item 13C	If question 13C is No, the following narrative field is required.	For question 13C, please fill out the narrative field for a response of No.
Item 13C narrative	Narrative text cannot be saved unless question 13C is No.	You did not answer No to question 13C and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 13 rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 14	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 14 contains errors; please scroll to view.
Item 14A	If question 14A1 is Never, question 14A must be No.	For question 14A, please select No since Never is selected in question 14A1.
Item 14B	If question 14A1 is Never, question 14B must be NA.	For question 14B, please select NA since Never is selected in question 14A1.
Item 14B	If question 14A is Yes, question 14B cannot be NA.	For question 14B, please select Yes or No since Yes is selected in question 14A.
Item 14B	If question 14B is No, the following narrative field is required.	For question 14B, please fill out the narrative field for a response of No.
Item 14B narrative	Narrative text cannot be saved unless question 14B is No.	You did not answer No to question 14B and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 14 rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 15 applicability	All pre-applicability questions must be answered.	Please answer all questions on this page.

Location	Logic	Logic Validation Error Message
Item 15 applicability	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 15 contains errors; please scroll to view.
Item 15 applicability	Item 15 applicability is a required field.	Please select Yes or No.
Item 15 applicability	If any of the six pre-applicability bullets are Yes, item 15 applicability must be No.	The answers above indicate that this case is not applicable. Please review answers above.
Item 15 applicability	If all of the six pre-applicability bullets are No, item 15 applicability must be Yes.	The answers above indicate that this case is applicable. Please review answers above.
Item 15 applicability	If the case is applicable for assessment of item 15, a case participant must be selected for Mother and/or Father.	Please select case participant(s) as Mother and/or Father because you indicated that this case is applicable for an assessment of this item.
Item 15 applicability	A case participant for Mother cannot be selected if the case is not applicable for item 15.	Please do not select case participant(s) who are included in this item as Mother because you indicated that this case is not applicable for an assessment of this item.
Item 15 applicability	A case participant for Father cannot be selected if the case is not applicable for item 15.	Please do not select case participant(s) who are included in this item as Father because you indicated that this case is not applicable for an assessment of this item.
Item 15 applicability	Different case participants must be selected for Mother and Father.	Please select different case participants for Mother and Father.
Item 15 applicability	If there are no entries in Face Sheet table G2 as Mother or Other, a message indicating that no case participants are available for assessment will show on the item 15 applicability page.	There are no case participants in Face Sheet table G2 that can be assessed as Mother.
Item 15 applicability	If there are no entries in Face Sheet table G2 as Father or Other, a message indicating that no case participants are available for assessment will show on the item 15 applicability page.	There are no case participants in Face Sheet table G2 that can be assessed as Father.
Item 15	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 15 contains errors; please scroll to view.
Item 15A1	If a case participant was selected for Mother on the applicability page, question 15A1 cannot be NA.	For question 15A1, please do not select NA since a case participant was selected as Mother and marked applicable for assessment in this item.
Item 15A2	If a case participant was selected for Mother on the applicability page, question 15A2 cannot be NA.	For question 15A2, please do not select NA since a case participant was selected as Mother and marked applicable for assessment in this item.
Item 15A2	If question 15A1 is NA, question 15A2 must be NA.	For question 15A2, please select NA since NA is selected in question 15A1.
Item 15B1	If a case participant was selected for Father on the applicability page, question 15B1 cannot be NA.	For question 15B1, please do not select NA since a case participant was selected as Father and marked applicable for assessment in this item.

Location	Logic	Logic Validation Error Message
Item 15B2	If a case participant was selected for Father on the applicability page, question 15B2 cannot be NA.	For question 15B2, please do not select NA since a case participant was selected as Father and marked applicable for assessment in this item.
Item 15B2	If question 15B1 is NA, question 15B2 must be NA.	For question 15B2, please select NA since NA is selected in question 15B1.
Item 15C	If question 15A1 is NA, question 15C must be NA.	For question 15C, please select NA since NA is selected in question 15A1.
Item 15C	If question 15A1 is Never, question 15C must be NA.	For question 15C, please select NA since Never is selected in question 15A1.
Item 15C	If question 15C is No, the following narrative field is required.	For question 15C, please fill out the narrative field for a response of No.
Item 15C narrative	Narrative text cannot be saved unless question 15C is No.	You did not answer No to question 15C and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 15D	If question 15B1 is NA, question 15D must be NA.	For question 15D, please select NA since NA is selected in question 15B1.
Item 15D	If question 15B1 is Never, question 15D must be NA.	For question 15D, please select NA since Never is selected in question 15B1.
Item 15D	If question 15D is No, the following narrative field is required.	For question 15D, please fill out the narrative field for a response of No.
Item 15D narrative	Narrative text cannot be saved unless question 15D is No.	You did not answer No to question 15D and entered narrative to explain the answer that is not required. Please remove narrative from this field and provide any comments that highlight strengths or challenges related to specific practices, systemic issues, or resources that affected this item in the narrative field in the rating section of this item.
Item 15 rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 16 applicability	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 16 contains errors; please scroll to view.
Item 16 applicability	Item 16 applicability is a required field.	Please select Yes or No.
Item 16 applicability	For foster care cases only, if the target child is age three or older (using first the date they exited care in Face Sheet question K, or the end of the PUR if still in care), then item 16 applicability must be Yes.	Please select Yes. This case is applicable for assessment because this is a foster care case of a child age three or older.
Item 16 applicability	For in-home cases only, item 16 can only be applicable if at least one child is selected for assessment.	Please indicate the name of at least one child who is included in an assessment of this item.

Location	Logic	Logic Validation Error Message
Item 16 applicability	For in-home cases only, a child cannot be selected for assessment if item 16 is not applicable.	Please do not select a child who is included in an assessment of this item if the case is not applicable.
Item 16A1 table	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 16 table contains errors; please scroll to view.
Item 16A1 table	Educational Needs is a required field.	You have not entered any educational needs. Please enter educational needs or enter None.
Item 16A1 table	Services Provided is a required field.	You have not entered any services provided. Please enter services provided or enter None.
Item 16A1 table	Services Needed But Not Provided is a required field.	You have not entered any services needed but not provided. Please enter services needed but not provided or enter None.
Item 16A1 table	When navigating back to item 16 after completing other items, validation will re-run on existing table 16A1 data.	Please review the data entered in each row of table 16A1, because an error has been identified. Please click on the educational need identified to review each row.
Item 16 rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 16 rating	When overriding item 16, an overridden outcome rating must be selected as well.	Please select an Overridden outcome rating.
Item 16 rating	When overriding Well-Being 2 on the item 16 rating page, an overridden item rating must be selected as well.	Please select an Overridden item rating.
Item 16 rating	If item 16 is overridden to Strength, the Well-Being 2 overridden rating must be Substantially Achieved.	Please select Substantially Achieved as the Overridden outcome rating since the item 16 overridden rating is Strength.
Item 16 rating	If item 16 is overridden to ANI, the Well-Being 2 overridden rating must be either Partially Achieved or Not Achieved.	Please select either Partially Achieved or Not Achieved as the Overridden outcome rating since the item 16 overridden rating is Area Needing Improvement.
Item 16 rating	If item 16 is overridden to NA, the Well-Being 2 overridden rating must be NA.	Please select NA as the Overridden outcome rating since the item 16 overridden rating is NA.
Item 16 rating	An outcome rating cannot be overridden unless the box is checked.	Please do not indicate an overridden rating unless you check the box.
Item 16 rating	An outcome rating must be provided if the box is checked.	Please select the overridden outcome rating.
Item 17 applicability	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 17 contains errors; please scroll to view.
Item 17 applicability	Item 17 applicability is a required field.	Please select Yes or No.
Item 17 applicability	For in-home cases only, item 17 can only be applicable if at least one child is selected for assessment.	Please indicate the name of at least one child who is included in an assessment of this item.
Item 17 applicability	For in-home cases only, a child cannot be selected for assessment if item 17 is not applicable.	Please do not select a child who is included in an assessment of this item if the case is not applicable.

Location	Logic	Logic Validation Error Message
Item 17	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 17 contains errors; please scroll to view.
Item 17A1	For foster care cases only, question 17A1 cannot be NA.	For question 17A1, for foster care cases, please answer Yes or No.
Item 17A2	For in-home cases only, since item 17 is only applicable if a child is selected for assessment, questions 17A1 and 17A2 cannot both be NA.	For questions 17A1 and 17A2, please answer Yes or No to at least one question since a child was selected as applicable for assessment in this item.
Item 17A3 table	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 17 table contains errors; please scroll to view.
Item 17A3 table	Identified Physical or Dental Health Needs is a required field.	You have not entered any identified physical or dental health needs. Please enter identified physical or dental health needs or enter None.
Item 17A3 table	Services Provided is a required field.	You have not entered any services provided. Please enter services provided or enter None.
Item 17A3 table	Services Needed But Not Provided is a required field.	You have not entered any services needed but not provided. Please enter services needed but not provided or enter None.
Item 17A3 table	When navigating back to item 17 after completing other items, validation will re-run on existing table 17A3 data.	Please review the data entered in each row of table 17A3, because an error has been identified. Please click on the physical or dental health need identified to review each row.
Item 17A4	For foster care cases only, question 17A4 cannot be NA.	For question 17A4, please do not select NA since this is a foster care case.
Item 17A4	If "No exceptions apply" is selected in question 17A4, no other selections can be made.	For question 17A4, if you have selected "No evidence found", please ensure that no other selections were made.
Item 17 rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Item 18 applicability	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 18 contains errors; please scroll to view.
Item 18 applicability	Item 18 applicability is a required field.	Please select Yes or No.
Item 18 applicability	For in-home cases only, item 18 can only be applicable if at least one child is selected for assessment.	Please indicate the name of at least one child who is included in an assessment of this item.
Item 18 applicability	For in-home cases only, a child cannot be selected for assessment if item 18 is not applicable.	Please do not select a child who is included in an assessment of this item if the case is not applicable.
Item 18	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 18 contains errors; please scroll to view.
Item 18	Table 18A1 is required before item 18 can be saved.	You have not completed table 18A1. Please complete this table.

Location	Logic	Logic Validation Error Message
Item 18A1 table	If any logic errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	Item 18 table contains errors; please scroll to view.
Item 18A1 table	Identified Mental/Behavioral Health Needs is a required field.	You have not entered any identified mental/behavioral health needs. Please enter identified mental/behavioral health needs or enter None.
Item 18A1 table	Services Provided is a required field.	You have not entered any services provided. Please enter services provided or enter None.
Item 18A1 table	Services Needed But Not Provided is a required field.	You have not entered any services needed but not provided. Please enter services needed but not provided or enter None.
Item 18A1 table	The table is required before the remaining questions can be answered.	Please complete the table before answering questions for this item.
Item 18A1 table	When navigating back to item 18 after completing other items, validation will re-run on existing table 18A1 data.	Please review the data entered in each row of table 18A1, because an error has been identified. Please click on the mental/behavioral health need identified to review each row.
Item 18A1 table	If there is only one row saved to table 18A1, that row can be edited but not deleted.	This row cannot be deleted from table 18A1. Please click on the mental/behavioral health need identified to edit.
Item 18 rating	All questions within an item must be answered to generate a rating.	Please complete all questions for this item to generate a rating.
Home: Case Overview (Submit for QA)	Reviewers must verify that there are no proper names in any narrative fields throughout the OSRI before submitting the case to QA.	Please check the box to indicate you have reviewed the Proper Names Report.
Home: Case Overview (Submit for QA)	A completed case will not submit for QA if there are any lingering errors.	The submission was unsuccessful. Please review the Status of each item below and revisit those items that are not complete and rated.
Narrative fields (All items)	Narrative text fields cannot exceed the allowed maximum length.	Please limit your entry to <max length> characters.
Rating Page (All Items)	If any override errors are present when the page is saved, an initial error message will instruct the reviewer to scroll down to view the specific error message.	The Item Rating contains errors; please scroll to view.
Rating Page (All Items)	An item rating cannot be overridden unless the box is checked.	Please do not indicate an overridden rating unless you check the box.
Rating Page (All Items)	An override reason cannot be given unless the box is checked.	Please do not indicate an overridden reason unless you check the box.
Rating Page (All Items)	An override reason cannot be saved without also indicating the override rating.	Please select the overridden rating.

Location	Logic	Logic Validation Error Message
Rating Page (All Items)	An item rating cannot be overridden without also indicating the override reason.	Please provide the override reason.
Rating Page (All Items)	An item cannot be overridden to the same item.	Please select a rating that is different from the calculated rating.
QA Notes (All Items)	QA Notes cannot be saved without a message.	Please specify a QA Note.
QA Notes (All Items)	QA Notes cannot be saved without a subject.	Please specify a subject.

Prefilled and Disabled

Location	Prefilled and Disabled (PFDA) Rule
Face Sheet J and K	For In-Home cases, set questions J and K to NA.
Face Sheet	If tables G1 or G2 have no rows, disable all Face Sheet questions.
Item 1A1 table	Prefill all fields with values from the most recently entered row.
Item 1	If table 1A1 has no rows, disable all item 1 questions.
Item 2 applicability	For foster care cases, set the first and second questions to No.
Item 2 applicability	For foster care cases, if the date of most recent entry into foster care (Face Sheet question J) is before the beginning of the PUR, set the third question to No.
Item 2 applicability	For foster care cases, if the date of most recent entry into foster care (Face Sheet question J) is during the PUR or if there is a date of discharge (Face Sheet question K), set the fifth question to No.
Item 2 applicability	For in-home cases, set the third, fourth, and fifth questions to No.
Item 2B	For non-foster care cases, set question 2B to NA.
Item 3E1, 3E, and 3F	For non-foster care cases, set questions 3E1, 3E, 3F1, and 3F to NA.
Item 3D1	If no Substantiated reports in table 1A1, uncheck and disable the first option in question 3D1.
Item 3D1	If no Opened For Services reports in table 1A1, uncheck and disable the second option in question 3D1.
Item 3F1	If no Substantiated reports in table 1A1, uncheck and disable the third option in question 3F1.
Item 3D1	If item 1 was marked NA, uncheck and disable the first option in question 3D1.
Item 3D1	If item 1 was marked NA, uncheck and disable the second option in question 3D1.
Item 3F1	If item 1 was marked NA, uncheck and disable the third option in question 3F1.
Item 4A	Prefill question 4A with the number of records in table 4A1 (but not disabled).
Item 5	If table 5A1 has no rows, disable all item 5 questions.
Item 5A2	Prefill question 5A2 from question 5A1 and disable.
Item 6A1	Prefill question 6A1 with Face Sheet question J, if it exists.
Item 6A2	Prefill question 6A2 using the dates in Face Sheet questions J and K or, if there is no date in question K, then the dates in Face Sheet questions J and E.
Item 6A3	Prefill question 6A3 with Face Sheet question K (date if it exists, NA otherwise).
Item 6A4	Question 6A4 prefills with responses from table 5A1.
Item 6A4	If item 5 is NA, then question 6A4 is Reunification.
Item 6C1, 6C2, and 6C	If non-OPPLA goals are selected in item 5, set questions 6C1, 6C2, and 6C to NA.

Location	Prefilled and Disabled (PFDA) Rule
Item 7 applicability	If no siblings, mark item 7 NA.
Item 8 applicability	If fewer than two children, set the first question to No.
Item 8E1, 8E, and 8F	If there is only one child or if the response to question 7A was Yes, set questions 8E1, 8E, and 8F to NA.
Item 8A1, 8A, and 8C	If item 8 is applicable and no Mother is specified, set questions 8A1, 8A, and 8C to NA.
Item 8B1, 8B, and 8D	If item 8 is applicable and no Father is specified, set questions 8B1, 8B, and 8D to NA.
Item 11A1	If item 11 is applicable and no Mother is specified, check the first option in question 11A1 and uncheck all others.
Item 11B1	If item 11 is applicable and no Father is specified, check the first option in question 11B1 and uncheck all others.
Item 12B	If item 12B is applicable and no Mother is specified, set questions 12B1 and 12B3 to NA.
Item 12B	If item 12B is applicable and no Father is specified, set questions 12B2 and 12B4 to NA.
Item 12C applicability	For non-foster care cases, set to NA.
Item 13 applicability	For non-foster care cases, set all item 13 pre-applicability questions relating to parents to No.
Item 13A	If item 13 is applicable and no Child is specified, set question 13A to NA.
Item 13A	If item 13 is applicable and no Child is specified, clear the "No" narrative field for question 13A.
Item 13B	If item 13 is applicable and no Mother is specified, set question 13B to NA.
Item 13B	If item 13 is applicable and no Mother is specified, clear the "No" narrative field for question 13B.
Item 13C	If item 13 is applicable and no Father is specified, set question 13C to NA.
Item 13C	If item 13 is applicable and no Father is specified, clear the "No" narrative field for question 13C.
Item 15 applicability	For non-foster care cases, set all item 15 pre-applicability questions relating to parents to No.
Item 15A1, 15A2, and 15C	If item 15 is applicable and no Mother is specified, set questions 15A1, 15A2, and 15C to NA.
Item 15B1, 15B2, and 15D	If item 15 is applicable and no Father is specified, set questions 15B1, 15B2, and 15D to NA.
Item 17 applicability	For foster care cases, set to applicable.
Item 17B1	For non-foster care cases, set question 17B1 to NA.
Item 17A4	For non-foster care cases, check the first option in question 17A4 and uncheck all others.
Item 18	If table 18A1 has no rows, disable all item 18 questions.
Item 18B	For non-foster care cases, set question 18B to NA.

Appendix B: SIG Stakeholder Types

Administrative Review Board

An Administrative Review Board may be used to conduct semiannual reviews of children in out-of-home care. Examples include citizen review boards, qualitative case review boards, and foster care review boards.

Attorney(s) for Agency

Attorney for Agency is the attorney responsible for representing the state or the child welfare agency in a dependency matter (abuse and neglect proceeding). Stakeholders in this category may be from the public child welfare agency or the district attorney's office.

Attorney(s) for Child/Youth

Also referred to as an attorney ad litem or guardian ad litem, the Attorney for Child/Youth is responsible for representing the child/youth in a dependency matter (abuse and neglect proceeding). Stakeholders in this category may be from the district attorney's or public defender's office, or they may be independent (e.g., from a private law firm or a panel of court-appointed attorneys).

Attorney(s) for Parent(s)

Also referred to as a respondent's attorney, the Attorney for Parent(s) is responsible for representing the parent(s) in a dependency matter (abuse and neglect proceeding). Stakeholders in this category may be from the public defender's office or independent (private law firm or panel of court-appointed attorneys).

CASA

A Court Appointed Special Advocate (CASA) is a volunteer appointed by a judge to advocate for the best interests of abused and neglected children. Stakeholders in this category may be CASA volunteers or the person or persons responsible for administering the applicable state or local CASA program. Some states also assign a guardian ad litem to the child who is a volunteer similar to a CASA and not the child/youth's legal attorney representing him or her in the dependency proceeding.

Child Welfare Agency Senior Manager(s)

Child Welfare Agency Senior Manager(s) are those individuals who serve in upper management positions within the child welfare agency and include positions such as the commissioner, secretary, director, deputy directors, and regional and district managers.

Child Welfare Caseworkers

Child Welfare Caseworkers are employees of the public child welfare agency who are responsible for providing all front-line services, including intake, assessment, investigative, family support/preservation, foster care, adoption, independent living, and case management, to children and families. This category does not include employees from a private agency contracting with the state to provide these services.

Child Welfare Program Manager(s)

Child Welfare Program Manager(s) are responsible for managing title IV-B and IV-E child welfare programs. Stakeholders in this category manage the state's foster care and adoption programs, the Stephanie Tubbs Jones Child Welfare Services Program (CWS), Promoting Safe and Stable Families Program (PSSF), Chafee Foster Care Independence Program (CFCIP), Education and Training Vouchers (ETV) Program, and other programs included in the state's Child and Family Services Plan.

Child Welfare Supervisors

Child Welfare Supervisors are employees of the public child welfare agency who provide direction and guidance to front-line staff in their provision of child welfare and child protective services. This does not include supervisors from private agencies contracting with the state to provide these services.

Contract Caseworkers/Supervisors

Contract Caseworkers/Supervisors are employees of a private agency with whom the state contracts to provide child welfare and child protective services to children and families. Stakeholders in this category may include caseworkers, social workers, social work supervisors, caseworker supervisors, family caseworkers, and child caseworkers.

Court System/CIP

The Court System includes staff (other than judges/commissioners) within the juvenile court system involved in child welfare dependency matters. The Court Improvement Program (CIP) is the program within states operated under the Administrative Office of the Courts (AOC) that is supported by federal grants to conduct assessments of the courts' foster care and adoption laws and judicial processes, monitor court improvement performance measures, and develop and implement a plan for system improvement. Stakeholders in this category may include AOC staff, court administrators, CIP personnel, and members of CIP projects. This category does not include judges.

Continuous Quality Improvement (CQI) Staff

CQI Staff are those persons responsible for administering CQI programs and conducting activities that include but are not limited to: (1) regularly assessing the quality of services under the Child and Family Services Plan; (2) assuring that there will be measures to address identified problems; (3) monitoring and conducting periodic evaluations of activities conducted under the title IV-E program; (4) implementing standards to ensure that children in foster care are provided with quality services that protect their safety and health; and (5) leading/facilitating the CQI process to improve programs, systems, and performance. Examples include CQI or quality assurance (QA) managers, CQI or QA reviewers and supervisors, case reviewers, and members of a CQI/QA steering committee.

Foster/Adoptive Licensing Staff

Foster/Adoptive Licensing Staff are individuals employed by the public child welfare agency or another state agency, or by contract with a private agency, who are responsible for the licensing of foster and adoptive parents. Examples include licensure staff, foster care/adoption social workers and supervisors, foster care workers, and adoption workers.

Foster/Adoptive Parents

A Foster Parent is a person, including a relative of the child, licensed or certified to provide 24-hour substitute care for children in the custody of the state. An Adoptive Parent is a person, including a relative of the child, who has been granted through the court the legal responsibility of caring for a child previously in the custody of the state.

ICPC Staff

Interstate Compact for the Placement of Children (ICPC) Staff are those responsible for ensuring the state's compliance with ICPC procedures for ensuring the safety and stability of child placements across state lines. Examples include ICPC administrators and deputy administrators, ICPC workers, and ICPC program managers.

Information System Staff

Information System Staff are persons responsible for developing and maintaining the child welfare agency's information system. These individuals may be employees of the agency or contracted staff. Examples include management information systems (MIS) staff, information technology (IT) managers and staff, and Statewide Automated Child Welfare Information System (SACWIS) managers and staff.

Judge(s)

A Judge is a public official appointed or elected to preside over a court of law to make decisions in dependency matters (child abuse and neglect cases). Examples include magistrate, district court, appellate, and Supreme Court judges; juvenile court commissioners; and special masters.

Juvenile Justice Department Staff

Juvenile Justice Department Staff are individuals employed by the state entity administering the state's juvenile justice system, which is responsible for intervening with youth involved in, or alleged to be involved in, delinquent behavior. Examples include probation and parole officers, supervisors, and managers; juvenile justice case managers; and social workers.

Law Enforcement

Law Enforcement describes the individuals and agencies responsible for enforcing laws and maintaining public order and public safety. Examples include local, county, city, state, and Tribal law enforcement officers, deputies, detectives, and managers/administrators of the organizations and agencies responsible for public safety.

Other Public Agency

Other Public Agency includes representatives from the state agencies responsible for administering other state and federal programs, including but not limited to Medicaid, Temporary Assistance for Needy Families, mental health, education, Housing and Urban Development (federal housing program), and child support.

Parents

Parents are the recipients of child welfare services. Stakeholders include parents who receive services on a voluntary (in-home) or involuntary (foster care) basis.

Public/Private Agency Training Staff

Public/Private Agency Training Staff are responsible for training child welfare caseworkers and supervisors. Examples include training staff employed by the agency and contracted trainers.

Recruitment and Retention Staff

Recruitment and Retention Staff are responsible for recruiting and retaining individuals to provide foster care and adoptive services to children in the custody of the state as a result of child maltreatment. Examples include foster care and adoption social workers, caseworkers, supervisors and managers, statewide recruiters, retention specialists, and recruitment specialists.

Relative Caregivers

Relative Caregivers are related to the child by blood, marriage, or adoption and provide 24-hour care for children in the custody of the department or agency. Examples include relative foster parents, kinship foster parents, and kinship caregivers. If the relative caregivers are licensed or certified, they should be categorized as foster/adoptive parents.

Service Providers

Service Providers are those individuals and agencies that provide services to children and families involved with the child welfare agency. Examples include therapists, psychologists, physicians, psychiatrists, substance abuse treatment providers, behavioral and mental health treatment providers, trauma counselors, domestic violence service providers, child development specialists, home visiting program providers, and early intervention program providers.

State Licensed/Approved Child Care Facility Staff

State Licensed/Approved Child Care Facility Staff are individuals employed by licensed/approved residential child care facilities operated by a public or private agency and providing 24-hour care and/or treatment for children who require separation from their own homes or group living experiences. Examples may include staff from child care institutions, group homes, residential treatment facilities, and hospitals.

Tribal Representative

Tribal Representatives are individuals designated by federally recognized Tribes to represent the Tribe's interest in child welfare matters. Examples include Tribal presidents; member(s) of Tribal councils, tribunals, or courts; and Tribal social services caseworkers, supervisors, and managers.

University Social Work Program

University Social Work Program includes college or university faculty and other staff administering a field of study toward a degree in social work. Examples include professors and teaching faculty, managers and other personnel administering the title IV-E stipend program, individuals responsible for curriculum development, and field practicum supervisors. These individuals may be involved in training child welfare staff.

Youth

Youth include those who are receiving, or previously received, foster care, Chafee Independent Living Program Services, or in-home services from the child welfare agency. Examples may include individual youth, and officers or other representatives from the state's youth advisory/advocacy board.

Other

Any person or entity not captured in any of the other stakeholder types.

Appendix C: Individualized Report Descriptions

Common Reports

Site List: The Site List report lists each of the site names associated with a review along with its associated site number. When cases are de-identified, the updated case name references these site numbers. There are no filters available within this report.

Case-Level Reports

Complete OSRI: The Complete OSRI report produces a table that shows all OSRI data for each case. Users filter by case name.

Case Rating Summary: The Case Rating Summary report displays case ratings for each case by item or outcome number. The report includes a description of the Performance Item or Outcome Type, and the ratings (e.g., whether the item was a Strength, Area Needing Improvement, or Not Applicable, and whether the outcome was Substantially Achieved, Partially Achieved, Not Achieved, or Not Applicable). Users filter by case name.

Case History Logs: The Case History Logs report tracks changes made to each case in two tables: Case Status History and Case Data History. The Case Status History table notes each date the case status was changed, the prior status, the new status, and who changed the status. The Case Data History table records the date of a change to a case entry, the page (e.g., Face Sheet, Item 1 Questions), the specific question on a given page, the prior value, the new value, and who made the change. Tracking begins after the user clicks "Save" at the point of case creation. Users filter by case name, may filter by pages or questions, and may sort by the Date or Question.

Case QA Notes: The Case QA Notes report lists all QA Notes for a specific case. The table presentation is sorted by case-level QA notes and item-level QA notes (e.g., Face Sheet, Item 1). Each QA Note will contain a summary of when it was created, who created it, and whether or not it was resolved. The note itself appears in a column to the right. Users filter by case name.

Item Rating Rationale Statements: The Item Rating Rationale Statements report provides a summary of all 18 item ratings for a given case. The report is organized by item number, calculated rating, overridden rating, final rating, reason for override, and any additional comments from the item rating page. Users filter by case name.

Review-Level Reports

Case Count by Type of Case: The Case Count by Type of Case report sorts cases according to the three case types: foster care, in-home services, and in-home services differential response. The report displays the number of cases by case type in each site. Users may filter by case status, case review month, PUR start date, and by cases that have been designated for PIP monitoring.

Case Counts by Review Month: The Case Counts by Review Month report displays the number of cases completed in a given month. The report displays the number and percentage of cases completed within each site (per Face Sheet question E). A secondary table displays case details for each of those cases, including the case name, case type, site, PUR start date, the date the case was created, the date the case was completed (Face Sheet question E), the date the case was finalized, and whether the case is designated for PIP monitoring. Users may filter by case status, site, case review month (up to 12 months at a time), and by cases that have been designated for PIP monitoring.

Face Sheet Report: The Face Sheet report summarizes elements of the Face Sheet for each case. The report includes some demographic information taken from table G1 (Child Table). The report also includes responses to questions E, I, J, L, and M. Users may filter by case type, case status, site, PUR start date, race, ethnicity, reason(s) for agency involvement, and by cases that have been designated for PIP monitoring.

State Rating Summary: The State Rating Summary report gives an aggregated summary of state CFSR performance for an entire review. The report provides both an individual and combined count of ratings for each item and outcome, as well as individual and combined percentages. Users may filter by case type, case status, site, case review month, PUR start date, reason for agency involvement, and by cases that have been designated for PIP monitoring.

Case Progress Report: The Case Progress report is organized by site. It provides a summary of the current status of cases under review. The report shows the reviewer(s), case name, case type, case status, the percentage of items rated, and the percentage of outcomes rated. Users may filter by case status, site, case review month, PUR start date, and by cases that have been designated for PIP monitoring.

Item Rating Summary: The Item Rating Summary report provides an item by item summary across all cases. The report is organized by case name, case type, calculated rating, overridden rating, final rating, reason for override, and any additional comments from the item rating page. The bottom of the report displays the total number of cases as well as the total number of each calculated rating, overridden rating, and final rating. Users must filter by an individual item, and may filter by case type, case status, site, PUR start date, reason for agency involvement, race, ethnicity, item rating, current permanency goal(s), by cases that have been designated for PIP monitoring, and by item ratings that contain comments.

Narratives for "No" Responses: The Narratives for “No” Responses report is a compilation of the narrative explanations that follow each No response throughout all cases. The report is organized by case name, case type, PUR start date, item number, question, and explanation in the narrative field following a No response. Users may filter by case, case type, case status, site, PUR start date, reason for agency involvement, item number, and by cases that have been designated for PIP monitoring.

Ratings by Case: The Ratings by Case report displays the item and outcome ratings for all cases. This report contains separate tables for the safety, permanency, and well-being outcomes. Each outcome for each case appears with a rating of Substantially Achieved (SA), Not Achieved (NACH), Partially Achieved (PA), or Not Applicable (NA). Each item in each case appears with a rating of Strength (S), Area Needing Improvement (ANI), or Not Applicable (NA). Users may filter by case type, case status, site, PUR start date, and by cases that have been designated for PIP monitoring.

Overridden Ratings: The Overridden Ratings report provides a summary of ratings that were overridden by Initial QA, Second Level QA, or Secondary Oversight staff. The report is sorted by case name, case type, calculated rating, overridden rating, and reason for override. This report contains separate tables for each item. Users may filter by case, case type, case status, site, and by cases that have been designated for PIP monitoring.

QA Notes: The Review-Level QA Notes report provides a way to compare QA Notes across multiple cases. This differs from the QA Notes report in the Case-Level Reports section and provides QA staff with a view of QA notes across all cases within an entire review. Users may filter by case name, item, case status, site, PUR start date, whether a note is resolved or unresolved, and by cases that have been designated for PIP monitoring.

State Case Elimination: The State Case Elimination report lists any eliminated cases, the date they were eliminated, and the reasons why they were eliminated. Users may filter by site and PUR start date.

Case Participants Interviewed: The Case Participants Interviewed report lists all children and case participants who were interviewed (as indicated in Face Sheet tables G1 and G2). The report is organized by case name, case type, site, case status, participant's role, and relationship to child. The bottom of the report displays the total number of cases, the total number of interviewed children, and the total number of interviewed case participants. Users may filter by case type, case status, site, participant's role, and by cases that have been designated for PIP monitoring.

Practice Performance Report: The Practice Performance Report provides an aggregated summary of practice performance for all 18 items in the OSRI across all cases in a review. Users may filter by case type, case status, site, PUR start date, reason for agency involvement, race, and ethnicity.

Item-Specific Reports

Item 1 Report: The Item 1 report details all responses related to Item 1 in a given state for every case in the OSRI. It provides a 1A1 Aggregate Reports Table, an Item 1 Aggregate Questions and Answers Table (A–C), and an Item 1 Ratings Summary Table. Users may filter by case type, case status, site, PUR start date, reason for agency involvement, item rating, and by cases that have been designated for PIP monitoring.

Item 2 Report: The Item 2 report details all responses related to Item 2 in a given state for every case in the OSRI. It provides an Item 2 Aggregate Applicability Questions Table, an Item 2 Aggregate Questions and Answers Table (A and B), and an Item 2 Ratings Summary Table. Users may filter by case type, case status, site, PUR start date, reason for agency involvement, race, ethnicity, item rating, and by cases that have been designated for PIP monitoring.

Item 3 Report: The Item 3 report details all responses related to Item 3 in a given state for every case in the OSRI. It provides an Item 3 Aggregate Questions and Answers Table (A–F), a 3D1 Aggregate Table, a 3E1 Aggregate Table, a 3F1 Aggregate Table, and an Item 3 Ratings Summary Table. Users may filter by case type, case status, site, PUR start date, reason for agency involvement, race, ethnicity, item rating, and by cases that have been designated for PIP monitoring.

Item 4 Report: The Item 4 report details all responses related to Item 4 in a given state for every case in the OSRI. It provides a 4A1 Aggregate Placement Table, a 4C1 Aggregate Table, an Item 4 Aggregate Questions and Answers Table (A–C), and an Item 4 Ratings Summary Table. Users may filter by case status, site, PUR start date, reason for agency involvement, race, ethnicity, item rating, and by cases that have been designated for PIP monitoring.

Item 5 Report: The Item 5 report details all responses related to Item 5 in a given state for every case in the OSRI. It provides a 5A1 and A2 Aggregate Permanency Goal Table, a 5G1

Aggregate Table, an Item 5 Aggregate Questions and Answers Table (5A3–G), an Item 5 Current Permanency Goals Summary Table (5A2), and an Item 5 Ratings Summary Table. Users may filter by case status, site, PUR start date, reason for agency involvement, race, ethnicity, item rating, current permanency goal(s), and by cases that have been designated for PIP monitoring.

Item 6 Report: The Item 6 report details all responses related to Item 6 in a given state for every case in the OSRI. It provides an Item 6 Aggregate Questions and Answers Table (A1–C) and an Item 6 Ratings Summary Table. Users may filter by case status, site, PUR start date, reason for agency involvement, race, ethnicity, item rating, current permanency goal(s), and by cases that have been designated for PIP monitoring.

Item 7 Report: The Item 7 report details all responses related to Item 7 in a given state for every case in the OSRI. It provides an Item 7 Aggregate Questions and Answers Table (A and B) and an Item 7 Ratings Summary Table. Users may filter by case status, site, PUR start date, reason for agency involvement, race, ethnicity, item rating, and by cases that have been designated for PIP monitoring.

Item 8 Report: The Item 8 report details all responses related to Item 8 in a given state for every case in the OSRI. It provides an Item 8 Aggregate Applicability Questions Table, an Item 8 Aggregate Questions and Answers Table (A1–F), and an Item 8 Ratings Summary Table. Users may filter by case status, site, PUR start date, reason for agency involvement, race, ethnicity, item rating, and by cases that have been designated for PIP monitoring.

Item 9 Report: The Item 9 report details all responses related to Item 9 in a given state for every case in the OSRI. It provides an Item 9 Aggregate Questions and Answers Table (A–D) and an Item 9 Ratings Summary Table. Users may filter by case status, site, PUR start date, reason for agency involvement, race, ethnicity, item rating, and by cases that have been designated for PIP monitoring.

Item 10 Report: The Item 10 report details all responses related to Item 10 in a given state for every case in the OSRI. It provides an Item 10 Aggregate Questions and Answers Table (A1–C) and an Item 10 Ratings Summary Table. Users may filter by case status, site, PUR start date, reason for agency involvement, race, ethnicity, item rating, and by cases that have been designated for PIP monitoring.

Item 11 Report: The Item 11 report details all responses related to Item 11 in a given state for every case in the OSRI. It provides an Item 11 Aggregate Applicability Questions Table, an Item 11 Aggregate Questions and Answers Table (A and B), an 11A1 Aggregate Table, an 11B1 Aggregate Table, and an Item 11 Ratings Summary Table. Users may filter by case status, site, PUR start date, reason for agency involvement, race, ethnicity, item rating, and by cases that have been designated for PIP monitoring.

Item 12 Report: The Item 12 report details all responses related to Item 12 in a given state for every case in the OSRI. It provides an Item 12A Aggregate Questions and Answers Table (A1–A2), an Item 12B Aggregate Applicability Questions Table, an Item 12B Aggregate Questions and Answers Table (B1–B4), an Item 12C Aggregate Questions and Answers Table (C1–C2), and an Item 12 Ratings Summary Table. Users may filter by case type, case status, site, PUR start date, reason for agency involvement, race, ethnicity, item rating, and by cases that have been designated for PIP monitoring.

Item 13 Report: The Item 13 report details all responses related to Item 13 in a given state for every case in the OSRI. It provides an Item 13 Aggregate Applicability Questions Table, and Item 13 Aggregate Questions and Answers Table (A–C), and an Item 13 Ratings Summary Table. Users may filter by case type, case status, site, PUR start date, reason for agency involvement, race, ethnicity, item rating, and by cases that have been designated for PIP monitoring.

Item 14 Report: The Item 14 report details all responses related to Item 14 in a given state for every case in the OSRI. It provides an Item 14 Aggregate Questions and Answers Table (A1–B) and an Item 14 Ratings Summary Table. Users may filter by case type, case status, site, PUR start date, reason for agency involvement, race, ethnicity, item rating, and by cases that have been designated for PIP monitoring.

Item 15 Report: The Item 15 report details all responses related to Item 15 in a given state for every case in the OSRI. It provides an Item 15 Aggregate Applicability Questions Table, an Item 15 Questions and Answers Table (A1–D), and an Item 15 Ratings Summary Table. Users may filter by case type, case status, site, PUR start date, reason for agency involvement, race, ethnicity, item rating, and by cases that have been designated for PIP monitoring.

Item 16 Report: The Item 16 report details all responses related to Item 16 in a given state for every case in the OSRI. It provides an Item 16 A1 Aggregate Education Table, an Item 16 Aggregate Questions and Answers Table (A and B), and an Item 16 Ratings Summary Table. Users may filter by case type, case status, site, PUR start date, reason for agency involvement, race, ethnicity, item rating, and by cases that have been designated for PIP monitoring.

Item 17 Report: The Item 17 report details all responses related to Item 17 in a given state for every case in the OSRI. It provides an Item 17 A3 Aggregate Physical and Dental Health Table, an Item 17 A4 Aggregate Table, an Item 17 Aggregate Questions and Answers Table (A1–B3), and an Item 17 Ratings Summary Table. Users may filter by case type, case status, site, PUR start date, reason for agency involvement, race, ethnicity, item rating, and by cases that have been designated for PIP monitoring.

Item 18 Report: The Item 18 report details all responses related to Item 18 in a given state for every case in the OSRI. It provides an Item 18 A1 Aggregate Mental/Behavioral Health Table, an Item 18 Aggregate Questions and Answers Table (A–C), and an Item 18 Ratings Summary Table. Users may filter by case type, case status, site, PUR start date, reason for agency involvement, race, ethnicity, item rating, and by cases that have been designated for PIP monitoring.

SIG Reports

Pre-Interview Report: The Pre-Interview Report displays those items and questions selected during the “SIG Set Up” process. Users filter by interview.

Interview Report: The Interview Report displays the notes of stakeholder responses to interview questions. Users filter by interview. Reports should be considered preliminary until the interview is finalized.

State Stakeholder Interview Report: The State Stakeholder Interview report displays the notes of stakeholder responses to interview questions and allows the user to filter results by one or more stakeholder, interview date, and item across all interviews within the review. Reports should be considered preliminary until all interviews are finalized.

QA Notes Report: The QA Notes report shows QA Notes for each stakeholder interview. Users may filter by interview, stakeholder, or item, in order to view all QA Notes for a given interview, or across interviews for a given stakeholder, or across interviews for a given item number. Reports should be considered preliminary until all interviews are finalized.