



October 02, 2024

Additional Qualifiers To Notes

These help everyone to understand how the contact occurred:

In Person: An option to designate face-to-face contact with participants or associates in the assessment/case.

Phone: An option to designate telephone contact with participants or associates in the assessment/case.

Email: An option to designate email contact with participants or associates in the assessment/case.

Other: An option to designate that information recorded in the note was obtained by means other than in person, phone, or email contact.

Guardian Note Types

Action Request: Documents a request for DCS staff to complete some type of Action.

After Hours: Documents contact occurring with afterhours or on-call staff outside normal business hours.

AG: Documents staff contact with an Assistant Attorney General. This Note has attorney-client privileged information and therefore is confidential and should not be released to parties outside the Department.

Allegation Finding: This note type houses historical findings information migrated from CHILDS. Not a writable note type.

Attempted Contact: To identify that contact was attempted and unsuccessful.

Case Conferences/Staffing: Documents a meeting between DCS staff and at least one other person when another Note type does not better describe the meeting. This includes the following meetings: Child and Family Team, Team Decision Making, IEP, etc. This Note type is not to be used to document Case Plan Staffing, see Staffing.

Child Contact: Documents contact between the DCS Specialist or other designated staff (i.e. monthly contact, ICPC, courtesy supervision, etc.) and child.

Clinical Supervision: Documents clinical supervision discussions held between a DCS Specialist and DCS Program Supervisor or with or by management staff such as DCS Program Manager, DCS Program Administrator, Assistant Director of Field Operations, and other management staff.

Collateral: Documents contact with parties associated with an assessment or case such as therapists, counselors, parent aides, attorneys, CASAs, probation officer, parole officers, school personnel, physicians, etc.

Court Hearing: Documents events that occurred during a court or FCRB hearing or Department initiated Administrative Case Review.

DCS Locate Efforts: Documents all person searches only. This includes all efforts to locate a person whether it is an absent parent/guardian/custodian, runaway youth, extended family members, and/or other significant persons. Documents the steps taken and search results from DCS Specialists, Program Specialists, Placement Coordinators, Eligibility Reviewers, Permanency Specialists, Team Decision Making Specialists, Family Engagement Specialists, DCS Locate and the Office of Child Welfare Investigations.

Disclosure: Used by the Centralized Records Coordination Unit (CRCU) to document disclosure of records during the course of the dependency case.

Education: Documents contacts with education and school system staff, and other collateral contacts or key events regarding the child's well-being, including education.

Family/Kinship Contact: Documents contact or actions between the DCS Specialist or other designated staff held with a family member, including Responsible Adults. This note is not to be used for contact with family/significant other when they are the out-of-home care provider, see Out-of-Home Care Provider.

Grievance Meeting: Documents a meeting related to a grievance that was made against the Department, typically to the Ombudsman, due to various circumstances; for instance, parent dissatisfaction or a relative/kin being denied as a caregiver for a child.

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Health: Documents contacts with health care providers, and other collateral contacts or key events regarding the child's well-being including mental health, physical health, or dental health.

ICPC Contact: Documents contact between the Department and the receiving state when the child is placed in out-of-state care.

In-Home Provider: This note type is only to be utilized by the Provider. Documents contacts between the in-home provider and the family.

Intake Cross Report Follow-up: for use by the DCS Centralized Intake Hotline, see Intake Hotline guide

Intake Email Notification: for use by the DCS Centralized Intake Hotline see Intake Hotline guide

Intake Field Notification: for use by the DCS Centralized Intake Hotline see Intake Hotline guide

Intake Other: for use by the DCS Centralized Intake Hotline, see Intake Hotline guide.

Investigation: Documents the investigation of a report and contact with persons during the investigation.

Law Enforcement: Documents contact with law enforcement, including tribal law enforcement.

OCWI Investigation: For use by OCWI to document the investigation of a report and contacts with persons during the investigation.

OLR General: Documents on-going monitoring activities, site visits, or other general documentation not related to a licensing investigation.

OLR Investigation: Documents any activity or contact related to a provider investigation/licensing issue.

Other: Documents any Note not captured by other types.

Out of Home Care Provider: Documents contact by the DCS Specialist or other designated staff with a person or agency authorized by the Department to provide care for a child in out-of-home care such as kinship caregivers, licensed foster parents, and group care staff.

Parent Aide: This note type is only to be utilized by the Provider. Documents contacts between the FC/NPP or SVO provider and the family.

Parenting Time: Documents parenting time and other contact monitored and/or observed between parent(s) and child(ren).

Parent/Caregiver Contact: Documents contact by the DCS Specialist or other designated staff with a parent/caregiver. Not to be used to document contacts with an out-of-home care provider.

Provider - General: A note that is entered by a contracted provider via the Guardian Portal.

PSRT: Documents activities completed by the PSRT Unit.

Psychological/Behavioral: Documents contact by the DCS Specialist or other designated staff with a person or agency authorized by the Department to provide psychological/behavioral care.

Relative Information: Documents information provided regarding relatives, such as a Seneca search.

Reporting Source Contact: Documents contact with the reporting source.

Service Provider: Documents contact between a service provider and the family. This note type is only to be utilized by the Provider.

Staffing: Documents case plan staffing. This includes documenting the discussions during the case plan staffing for the selection or revision of the permanency goal.

Subsidy Documents: Documents conversations around rate increase or adding conditions, and the request for documentation.

Subsidy Family Contact: Documents contact by the Subsidy Unit with an adoptive family or permanent guardian. May include phone calls, emails, or attendance at meetings such as an IEP or CFT.

Subsidy Out of Home: Documents contact and renegotiations related to an adopted child being placed outside of the adoptive home. Applies if the child is in the adoptive parents or Department's custody.

Subsidy School Verification: Documents requests for or the receipt of documentation for adoptive children over the age of 18 to verify continued subsidy eligibility.

Supervision Note: This note type is no longer in use, although records are still visible with this note type, they require a new type when corrected. Documents staff contact or consultations with or by a supervisor or with or by management staff such as Assistant Program Manager, Deputy Program Manager, Program Manager, Field Operations Manager, DCS Program Administrator, DCS Assistant Directory, and other management staff.

Transfer Summary: Documents reason for transfer, future hearing dates and appointments, summary of progress, events and concerns related to the transfer of a case.

Tribal Contact: Documents any contact with a tribe, including with tribal social services.