

Business Case Flow for QRTP Referrals and QI Assessment

Within 1 Business Day of Placement:

- Within 1 business day of the need for a 30-day assessment by a qualified individual (QI), the local department of social services (LDSS) with care and custody or custody and guardianship of the child will complete the *Local Department of Social Services Referral for Qualified Individual Assessment* form ([OCFS-5570](#)) and send via an email to the QI to commence the assessment. The referral will include:
 - Date child was placed in foster care
 - Child's name
 - Child's DOB
 - Where child is placed/located
 - Contact name/number for voluntary agency (VA)/foster boarding home (FBH) where child is placed
 - Contact name and number of LDSS caseworker assigned
 - Parent/caretaker contact information
- The LDSS will document the date the referral was sent to the QI in a progress note in CONNECTIONS (CNNX).
- Upon receipt of the referral, the QI will acknowledge receipt of referral and confirm the name of the QI who will be conducting the assessment.
- At the time of confirmation of the QI, the name of the QI and the date by which the assessment must be completed will be established and mutually agreed upon by the LDSS and QI and will be documented by the LDSS in a progress note in CNNX.
- QRTP will commence other required assessments within 30 days, including:
 - Physical and Dental
 - Behavioral Health Assessments (substance abuse, developmental, mental health)
 - Psychosocial Assessment
 - Educational Assessment

Within 5 Days of Placement

- Within 5 days of the placement, the LDSS will provide the QI with any relevant documents that help to inform the QI's decision-making process. These documents may include but are not limited to: CNNX child welfare history, current mental/medical evaluations, school records, probation reports and progress notes.
- LDSS, in consultation with its legal department, will file a motion to the court to schedule 60-day court review

Recommended timeframes for completion of 30-day assessment by QI:

Day 1 – 15

- The QI reviews the referral and documentation.
- In conjunction with the LDSS, the QI identifies the child's family and permanency team members.

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- The QI interviews and gathers information from the child's permanency team, as defined in SSL §409-h(1)(b), including but not limited to the child, family and any fictive kin deemed to be part of the permanency planning team.
 - The QI interviews the family and youth to obtain or clarify any information needed to complete the assessment and formulate child-specific short- and long-term mental and behavioral health goals.
 - The QI utilizes an Office of Children and Family Services (OCFS)-approved, age-appropriate, evidence-based, validated functional assessment tool as part of child's assessment.
- The QI reviews the assessment information and begins to formulate recommendations regarding the following:
 - Whether the needs of the child can be met with family members or through placement in a foster family home
 - If not, the reasons why the child's needs cannot be met by the family or a foster family home
 - Which placement type would provide the most effective and appropriate level of care for the child in the least restrictive environment and be consistent with the short-term and long-term goals specified in the permanency plan
 - If the recommended placement is a QRTP, why that setting will provide the most effective and appropriate level of care for the child in the least restrictive environment
 - How that placement is consistent with the short-term and long-term goals specified in the permanency plan
 - The child-specific short- and long-term mental and behavioral health goals for the child

There should be ongoing communication between the LDSS and the QI as needed to support the timely completion of the assessment. By day 15, the LDSS must communicate with the assigned QI regarding progress of assessment and any barriers or concerns. That communication must be documented in a progress note in CNNX.

Day 15- 18

- Working in conjunction with the LDSS, the QI must schedule the family and permanency team meeting BY DAY 18. The meeting must be held at a time and place convenient for the family.
 - Family and permanency team refers to all appropriate biological family members, relative and fictive kin of the child, as well as professionals (as appropriate) who are a resource to the family of the child, such as teachers, medical or mental health providers who have treated the child, or clergy.
 - If the child is age 14 or older, the team must also include the members of the permanency planning team for the child that are selected by the child in accordance with the Title IV-E case planning requirements SSL section 409-h(1)(b).
- Completion of the CANS or CASII Tool must be done by day 18.

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Day 20 – 25

- In conjunction with the LDSS, the QI convenes the family and permanency team meeting BY DAY 23 at a time and place convenient for the family.
- By scheduled permanency planning meeting, the QI completes assessment and recommendations regarding the following:
 - Whether the needs of the child can be met with family members or through placement in a foster family home
 - If not, the reasons why the child's needs cannot be met by the family or a foster family home
 - Which placement type would provide the most effective and appropriate level of care for the child in the least restrictive environment and be consistent with the short-term and long-term goals specified in the permanency plan
 - If the recommended placement is a QRTP, why that setting will provide the most effective and appropriate level of care for the child in the least restrictive environment
 - How that placement is consistent with the short-term and long-term goals specified in the permanency plan
 - The child-specific short- and long-term mental and behavioral health goals for the child
- The QI updates CANS/CASII (if needed)
- If QI determines that a QRTP is an inappropriate setting for the child, the LDSS should proactively work with the QRTP within 30 days of the QI's decision to identify an appropriate setting. Please note, per SSL § 409-h the child must remain in the QRTP until the 60-day court review.

Day 25-30

- The QI completes the *Qualified Individual Report* ([OCFS-5571](#)) and the *Qualified Individual Summary Assessment Report* ([OCFS-5572](#)).
- The QI submits the completed assessment tool (CANS or CASII), the *Qualified Individual Report* ([OCFS-5571](#)), the *Qualified Individual Summary Assessment Report* ([OCFS-5572](#)), and documentation to the LDSS.

Day 30-35

- The QI (or their designee) submits documents (assessment, determination and documentation) to the court WITHIN 5 DAYS OF COMPLETION of the report by the QI.
 - Provides assessment, the *Qualified Individual Report* ([OCFS-5571](#)), the *Qualified Individual Summary Assessment Report* ([OCFS-5572](#)), determination and documentation to parents, attorneys for child, and attorneys for parents
 - Provides the *Qualified Individual Summary Assessment Report* ([OCFS-5572](#)), with confidential information redacted, to the LDSS or OCFS with care and custody or custody and guardianship of the child, as applicable, and to the parties to the proceeding