



## Client Care Web User Manual: TFC Placement Management.

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### Introduction

Rapid Resource for Families (RRFF), in conjunction with our database developer, Client Care Web (CCW), provide a referral and data collection platform to agencies and Managed Care Organizations (MCO) within North Carolina.

This user manual will explain the use of CCW to match and collect information on all of your Therapeutic Foster Care placements in an identified catchment.

Our collection focuses on the placement—meaning, we look at the youth matched with a TFC home as our unit of analysis. It is beneficial to keep this in mind when working in CCW.

## Logging onto CCW

There are two types of accounts with CCW. First, there is a “Public” side account. This account is open to the public; anyone may create this account. The only purpose of the public side is to accept new referrals for out-of-home-placement (This type of account is used by DSS, MCO Care Coordination, or PRTFs to create referrals). To access this type of account, click the “Click here to make a referral” link on [www.ncrapidresource.org](http://www.ncrapidresource.org).



The second type of account is used by the agencies providing the TFC services to look at, match, and collect data for the TFC referrals entered from the public side. This type of account is “gated,” meaning that you will only have this account if your agency has requested that you require it. To access this type of account, you will need to find the “RRFF Client Care Web (CCW) Agency Login” at the bottom of the page [www.ncrapidresource.org](http://www.ncrapidresource.org). This is the link that should always be used to login.

### RRFF Client Care Web (CCW) Agency Login

Your username will always be your full email address. Below are the directions to set up for the first time, or reset your password.

1. Go to <http://ncrapidresource.org/>
2. Click “Client Care Web (CCW) Agency Login” at the bottom of the page. You may also access the link directly at: <https://www.clientcareweb.com/Login.asp>
  - a. This is the link you should always follow to login onto the agency side of the database.
3. Click the red "Forgotten Password?" under the login information.
4. Your full email address is your USERNAME
5. You should get an email from sender “CCW-alerts” and the title “rrff pw setup” within a few minutes. There, you will find a link that will take you back to the database portal. The page should appear with your email address filled in the USERNAME box.
6. Create your new password in the PASSWORD box. Once you have gotten the alert email, you have 2 hours to update your password.
7. Attempt to log in.

## Finding new referrals

As a member in the network or providers, you will have access to all TFC and Basic Foster Care referrals from across the state. Feel free to take advantage of this. You can access all referrals from the Manger Tool/Referral search page. CCW has filtering functions to make finding different types of referrals easier.

By default, the page will show you all referrals from across the state. To limit the number of referrals you see, use following filters:

Last Name: search by last name of youth

First Name: search by first name of youth

Referral ID: Each referral is given a 5-digit referral ID upon its creation

Youth ID: Each referral that is placed and matched with a home will be given a Youth ID

Referral Status: This filter limits the selections by the status of the referral.

*All* = No filter applied, displays all available referrals

*Placed* = Displays all referrals with Placement date entered.

*IAFT Placed* = Displays all referrals with IAFT Placement date entered. Youth ID starts with “M” or “I”.

*TFC Placed* = Displays all referrals with TFC placement date entered. Youth ID starts with “R”.

*Unplaced* = Displays all referrals that are available for placement.

*Active* = Displays list of referrals that are currently available to network providers for review for placement. Active referrals are all referrals that have the MCO Active toggle checked.

*Discharged* = Displays all referrals with a Discharge date entered.

*New Referral* = Displays all referrals that require an initial response from the network provider.

*Priority* = Displays all referrals that are marked as a priority referral by the MCO.

(Note: You will only have access to IAFT® referrals if you are a designated IAFT® provider).

Referral Type: this filter limits the view of the type of referral (TFC, IAFT®, BFFC)

MCO: this filter limits the view by the MCO which the youth are associated.

EXAMPLE: If you were looking to fill a TFC home within the Partners catchment, the following filters could be applied to limit the referrals to review.

Referral Status: *Active*

Referral Type: *TFC*

MCO: *Partners*

The screenshot shows a search interface for referrals. At the top, there are four input fields for 'Last Name', 'First Name', 'Referral ID', and 'Youth ID'. Below these is a 'Filter:' section with several dropdown menus: 'Referral Status' (set to 'Active'), 'Referral Type' (set to 'TFC'), 'MCO' (set to 'Partners Mental Health'), 'Gender' (set to 'All'), and 'Age Group' (set to 'All'). There is also a 'Placement County' dropdown set to 'All'. At the bottom of the filter section are 'Search' and 'Clear Search' buttons.

## Partners Requirements to Respond to Referrals

1. Partners is requiring, at minimum, that all new TFC referrals entered into the system be reviewed by each of the TFC provider agencies.
2. This simplest way to comply is to put into place a process to monitor for new referrals.
  - a. Create a daily schedule check for new referrals
  - b. Click “Manager Tools/Referral Search”
  - c. Enter the following filters
    - i. Referral Status: *New Referral*
    - ii. Referral Type: *TFC*
    - iii. MCO: Partners *Behavioral Health*
3. This will produce a list of all referrals that do not have a response from your agency (Note: you may see referral of which your agency has already placed. Enter a “Yes” response to clear out these referrals).

In the screenshot above, you can see that this provider only has a single referral to respond to. A blank box in the “Response” column shows that a response is still required.

You will be in compliance with Partner’s requirements if there are no referrals presenting with these filters applied. To enter a Response, proceed to the next page for detailed directions.

The screenshot shows the 'Referral Search' interface. At the top, there are tabs for 'Manager Tools', 'Facility Info', 'Reports', 'Notes', and 'ERR'. Below these is a breadcrumb trail: 'New Referral' > 'Referral Search' > 'Placements' > 'Self Cert Placement' > 'Self Cert Facility'. The main section is titled 'Referral Search' and contains several filter fields: 'Referral Status' (New Referral), 'Referral Type' (TFC), 'MCO' (Partners Mental Health), 'Gender' (All), 'Age Group' (All), and 'Placement County' (All). There are 'Search' and 'Clear Search' buttons. Below the filters is a table with the following data:

Edit	Referral Date	Last Name	First Name	Referral Type	IQ	Referral ID	Youth ID	Facility	Agency	Response	Placement Date
<a href="#">Edit</a>	10/13/2017 9:25:00 AM	██████	██████	TFC	0	33051					<a href="#">Add</a>

A red circle highlights the 'Response' column in the table, which is currently empty.

## Reviewing New Referrals

1. To review new referrals, apply the “New Referral” filter to the Referral status box. This will display all referrals that lack a current “Response” to the referral.
2. To open the referral for review from the referral search bottom, click Edit.
3. Read the information about the referral on the referral Intake page.
4. If necessary, contact the referral source (the contact information should be on the intake page) for addition information.
5. After making a decision about the ability of your agency to place this youth, click “Matching Results”

◦ Intake ◦ Matching Criteria ▶ Matching Results ◦ Placement ◦ Discharge ◦ Move

6. At the bottom of the Matching Result Page select a response and enter a note (notes are helpful, please include additional information for analysis if you can).
  - a. The responses are defined as
    - i. Yes, we can place this person - Yes, our agency has an appropriate home. We are matching the child with a family in the data base with our agency.
    - ii. No, we cannot place this person—Geography - Our agency does not have homes available for this service in the geographic area(s) requested.
    - iii. No, We cannot place this person—Family Skill Set - Our agency has homes available but does not have one equipped to meet the treatment needs or specific requirements for placement of this child.
    - iv. No, We cannot place this person—Treatment - Our agency does not have the treatment services requested.
    - v. Child Already Placed -The referral source had previously placed the child with another agency at the time of my agency follow up.
    - vi. All Beds are full - There are no vacant beds in our homes for the service and geography requested.
    - vii. Maybe - Our agency has an open home with an open bed and we are pursuing the ability to move to placement with the family. (For any maybe responses, please return to the referral to finalize the response to either a yes, or no).
7. After selecting a response, click SUMBIT. When you return to the referral search page, note that this referral will no longer be in view with the “New Referral” filter selected.
8. The system should be checked each workday, using the “New Referral” filter to find new referrals. Not clearing out new referral with a response can easily make your page unmanageable, as new referrals are made daily.

## Matching a youth to a home.

The most important single piece of data collected is the placement date and matching with a TFC home. Once you physically placed a youth into a home for TFC, it is time to log this in CCW.

Ensure you have the following data ready before you attempt to match a youth with a home. First, the date of the first night the youth spent in the home (head-in-bed) and second, that you have already entered the home into the data base.

### Adding a home to your Facility List

TFC homes are called Facilities in CCW. The home must be entered before you can match the youth with the home.

1. Go to the Facility Info Tab in CCW.
2. Click “Enter New Facility”
3. Complete this form to the best of your knowledge, ensuring that the “Status” dropdown is marked active and a Facility type toggle is checked. There has to be a valid address as well. **Lastly, ensure that the “Agency Licensed with” has your agency marked in the drop-down. If you do not mark the home with your agency, the facility will not be available for matching.**
4. Click Submit.



The screenshot shows the 'Facility Info' tab in the ClientCare Web application. The form is titled 'Facility Information' and contains the following fields and options:

- Name: Bob and Mary Smith
- Status: Active (dropdown menu)
- Status Reason: Licensed (dropdown menu)
- Status Date: 11/01/2018
- Facility Type: Radio buttons for Therapeutic Foster Care, Intensive Alternative Family Treatment (selected), Basic Family Foster Care, PRTF to IAPT Transition, and Emergency Rapid Response.
- Address: 147 W Franklin (with a Google Map icon)
- Apartment / P.O. Box: (empty field)
- City: Gastonia
- State: NC (dropdown menu)
- Zip: 28902
- Phone: (704) (dropdown menu)

5. After the home is in the database you are ready to match the youth with the home.
6. Find the Referral Search page under the Manager Tools tab.
7. Search for the youth with the filtering tools
8. Click Edit to open the referral
9. Click the Placement link (you may also access the placement page from the referral search page by clicking the “ADD” button under the “Placement Date” column).
10. On the placement page, click the placement type (note: the system will limit the home selection to that type; if the home that you need doesn't appear, check to see if it is marked “Active” and the treatment level matches, for example “Therapeutic Foster Care”), add the placement date (head-in-bed), select the facility name from the Housing drop down and click submit.

Manager Tools   Facility Info   Reports   Notes   ERR

• New Referral   • Referral Search   • Self Cert Placement   • Self Cert Facility

**September, Bobby**

• Intake   • Matching Criteria   • Matching Results   • Placement   • Discharge   • Move   • Clone to new referral

**Referral Placement**

Placement Type:  
 TFC (Therapeutic Foster Care)  
 IAFI (Intensive Alternative Family Treatment)  
 BFFC (Basic Family Foster Care)  
 ERR (Emergency Rapid Response)

IAFI Office/Team:  
 IAFI Coordinator:

Date of Placement:

Housing:

Last 6 of SSN (Required for IAFI Only):

Type	Housing	SSN	Date	Delete
TFC	Tom and Betty Hill	xxx-	9/31/2016	Delete

11. You will note that a new record is created. If there is an error, delete this and re-enter the record.

12. Also, the facility name is now filled in on the Referral search page.

**Referral Search**

**Referral:**  
 Last Name:   
 First Name:   
 Referral ID:   
 Youth ID:

**Filter:**  
 Referral Status:  [?](#)  
 Referral Type:   
 MCO:

Edit	Referral Date	Last Name	First Name	Referral Type	IQ	Referral ID	Youth ID	Facility	Agency	Response	Placement Date
<a href="#">Edit</a>	9/13/2016 10:08:03 AM	Bobby	Hill	TFC	0	31460	R01	Leslie Nope	<span style="background-color: black; color: black;">XXXXXXXXXX</span>	Yes	<a href="#">Add</a>

## Discharging a Youth from TFC.

Upon discharge, the discharge information will need to be entered.

1. Use the filtering functions on the Referral search page to find the youth.
2. Click “Edit” to open the youth’s file.
3. Click the “Discharge” link
4. Fill in the discharge page (Note: the discharge date must be completed)
5. Once you have submitted this, the youth will be taken off of the census.

Client Referral  
Page 9



Rashel Lauret  
19:55 Logout  
✉ Imaill

Direct Support Professional	Manager Tools	Facility Info	Reports	Human Resources	Notes	ERR
◦ New Referral	◦ Referral Search	◦ MCO Search	◦ MCO Billing	◦ Placements	◦ Self Cert Placement	◦ Self Cert Facility
◦ MCO Placement Report						

[test, test](#)

◦ Intake	◦ Matching Criteria	◦ Matching Results	◦ Placement	◦ Attendance Calendar	▶ Discharge	◦ Move
◦ Clone to new referral						
◦ ACE Questionnaire						
◦ Behavior Checklist						
◦ CGas Score						

### Discharge Summary Form

Discharged on 4/9/2018 4:34:41 PM by Bill Copeland

Edited on 4/9/2018 by Bill Copeland

Admit Date

Discharge Date

09/01/2021

Is the location selected above the permanency solution for the youth?

- Yes  
 No  
 Unknown

Does the youth have a permanency plan in place?

- Yes  
 No  
 Unknown

Select the best response regarding permanency solution for the youth at discharge

Select a Response

Other- Please briefly explain in narrative box

Where is the youth going to be placed next? (SELECT A LOCATION OR BEST APPROXIMATION)

- At Home of Legal Guardian  
 After Care  
 Alternative School
- Adoptive Programs  
 Child Care  
 Emergency Care - Residential

### Moving a Youth from one TFC home to another within your own agency

In order to track where each youth place on any given day, we must always create a new “File” or “Referral” when a youth is moved. The system will clone the new file and guide you to the information you need to enter to complete this task.

1. Go to the “Move” link under the Manager Tools tab.
2. Enter the discharge information as it pertains to the first home (this page looks just like a normal discharge), at the bottom of the page, you will see additional placement information. Enter the new placement information for the second home, matching the youth with the new home (Note: the home must have already been entered into the Facility Info page to be available).
3. Click submit
4. The System will create a clone of the referral for tracking purposes. This will be seen on the referral search page.

Edit	Referral Date	Last Name	First Name	Referral Type	IQ	Referral ID	Youth ID	Facility	Agency	Response	Placement Date
<a href="#">Edit</a>	7/28/2016 9:25:16 AM	Original	Sarah	TFC	0	31450	R05	Bill and Nancy Smith	Alexander Youth Network	Yes	<a href="#">Add</a>
<a href="#">Edit</a>	7/28/2016 9:25:16 AM	Original	Sarah	TFC	0	31449	R01	Jake New	Alexander Youth Network	Yes	<a href="#">Add</a>

Note that there are now two files for this youth, tracking the placement and discharge dates that the youth was in each distinct home.

### Creating a new referral to go out to the network for matching.

If, for whatever reason, you have a youth in treatment that needs to be moved to a new home, but your agency does not have a current home that will be appropriate, you can clone a new referral that will go out to the other providers.

1. Open the file where the youth is currently placed.
2. Click “Clone to new referral” at the furthest right position.
3. The system will give you a choice
  - a. “Make a referral without Discharge” – This option creates a clone to go out to the other providers without discharging them from their current home.
  - b. If you have already discharged this youth, you may discharge them from the current home at the same time you are creating the clone. Fill in the discharge information on the discharge summary form to discharge the youth.

**Original, Sarah**

◀ Intake ◀ Matching Criteria ▶ Matching Results ▶ Placement ▶ Discharge ▶ Move ▶ Clone to new referral

Make new referral without Discharge

**Discharge Summary Form**

Admit Date 8/24/2016

Discharge Date

Where is the youth going to be placed next?

At Home of Legal Guardian

After Care

Alternative School

Day Treatment Program

Emergency Foster Care

Intensive Family Support

Level 3 Moderate Residential Group Care

Independent Living - Foster Care

Homeless Shelter

DSS/DJJ Residential Group Care

Multipurpose Residential Care

Respite Foster Care

Residential Treatment Center

Supplemental School Programs (Before/After School)

With Relatives

PRTF

Adoptive Programs

Child Care

Emergency Care - Residential

Family Foster Care

Level 4 High Residential Group Care

Level 2 Low Residential Group Care

Independent Living - Residential

Maternity Home Program

Hospital

Outpatient Counseling

Respite Care - Residential

Specialized Foster Care

Therapeutic Foster Care

Wilderness Camping

With Non-family Member

Detention

Did the overall functioning of the youth improve?

..

**Note: you will need to find the new referral in the system to update it with new information.**

## Self-Certification of Placement data

To ensure that we are collecting “good data,” we ask that you complete a Self-Certification of your placement data. Remember, each time a youth is placed with a home, there should be an individual file documenting this. The current requirement is that the self-certification will be completed by the 15<sup>th</sup> of each month. The MCO will of completion rates.

1. Find the “Self Cert Placement” link under the Manager Tools tab.
2. Select the type of placements you would like to certify—for example “TFC Therapeutic Foster Care. The page will refresh, showing only that type of placement type
3. This page can be exported to Excel (copy and pasting into Excel works as well), you could also print this page.
4. The youth you currently have in placement with appear on the first table; youth that have been recently discharged will appear at on the second table.
5. Review this information, noting any error. Make special note that the youth is matched correctly with the home that they are currently placement with. If you find an error in your data, fix this by finding the file and making the needed corrections. If you need assistance, feel free to contact RRF.
6. Once you have ensured that the information is correct, click the “Certify Data is correct” button. A file will be created, showing the date and time of certification. This file can be downloaded as well as a record.

The screenshot shows the 'Self-Certification' page in the Client Care Web. It features two main data tables. The first table, 'Currently Placed Youth', lists 8 youth with columns for Ref\_ID, YouthID, LMC, Last, First, Type of Placement, Date of Placement, Facility, Agency, MP1 Office, MP1 Contributor, Discharge Date, and Role. The second table, 'Recently Discharged Placements (3 Months)', lists 4 youth with similar columns, showing their discharge dates and roles.

31448	R01	Alliance Behavioral Health	Tester	Jake
-------	-----	----------------------------	--------	------

Total Youth Currently in Placement: 8  
Total Placement Recently Discharged: 8

Date of Cert	Type
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The system gives you basic summaries to guide you review at the bottom of the page.

### Self-Certification of Home Data

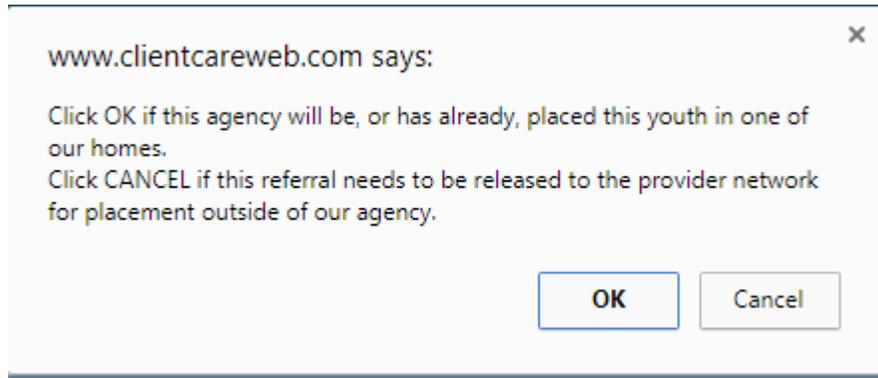
To ensure that we are collecting “good data,” we ask that you complete a Self-Certification of your home data. The current requirement is that the self-certification will be completed by the 15<sup>th</sup> of each month. The MCO will of completion rates.

1. Find the “Self Cert Faculty” link under the Manager Tools tab.
2. The table will display all the home you have entered on your Facility Search page that are marked as active.
3. This page can be exported to Excel (copy and pasting into Excel works as well), you could also print this page.
4. Review this information, noting any error. If you find an error in your data, fix this by finding the file and making the needed corrections. If you need assistance, feel free to contact RRF.
5. Once you have ensured that the information is correct, click the “Certify Data is correct” button. A file will be created, show the data and time of certification. This file can be downloaded as well as a record.
6. There are two common mistakes that may be on your table. First, if a home is missing from your list, add the home under the Facility Info tab with the Enter New Facility function. Second, you may see a home on your list that is no longer active. To correct this, find the home under the Facility search page, edit the status from Active to “Inactive” or “Closed,” and the home will no longer appear on the certification table.

Name	Address	City	County	State	Zip	Agency	Treatment Level	Status	Status Date
Betty ERR Home	555 Forest Street	Mebane	Alamance	NC	27302	Alexander Youth Network	Emergency Rapid Response	Active	7/27/2016
Bob and Mary Smith	147 W Franklin	Gastonia	Gaston	NC	28502	Alexander Youth Network	Intensive Alternative Family Treatment	Active	03/01/2016
Betty Wright	456 Round Oak	Raleigh	Alamance	NC	27616	Alexander Youth Network	Therapeutic Foster Care	Active	9/13/2016
Bill and Nancy Smith	1234 Green Street	Mebane	Alamance	NC	27203	Alexander Youth Network	Therapeutic Foster Care	Active	8/24/2016
Cletus Hillsborough	123 red street	Durham	Durham	NC	27302	Alexander Youth Network	Therapeutic Foster Care	Active	9/1/2016
Don Durham	55 Red Wood Street	Durham	Durham	NC	27302	Alexander Youth Network	Therapeutic Foster Care	Active	09/01/2016
Jake Naw	202 Quaker Creek Drive	Mebane	Alamance	NC	27302	Alexander Youth Network	Therapeutic Foster Care	Active	7/18/2016
Jake Original	1234 Main	Mebane	Alamance	NC	27302	Alexander Youth Network	Therapeutic Foster Care	Active	7/1/2016
Larry Home	2222 Red	Mebane	Alamance	NC	27302	Alexander Youth Network	Therapeutic Foster Care	Active	7/1/2016

**Creating a new referral to document placement when a referral did not come across the database.**

Many times, an agency will place a youth where the referral did not originate from a referral in CCW. Mco’s still require that these youths be documented in the database for tracking. To create a new referral, go to Manager Tools/New Referral; after clicking on “New Referral” the system will give you a pop-up message:



If you are creating a referral for documentation purposes (meaning, you have placed this youth in one of your homes); click “OK.” However, ensure that you have already entered the TFC home under the Facility Info Tab (see page 6 to view instructions on adding a new TFC home). After clicking OK, the system will display the referral form with a placement dialog box at the bottom. Complete the referral, match the youth with a home, and the system will create the referral already matched (there will be no need to search for the referral and match later). This youth will appear in your self-certification list.



If you click “Cancel,” the referral will go out to the rest of the network providers for matching.

**NOTE:** Network Providers and MCO’s have requested that there be additional mandatory items on all referrals. This includes:

First Name	Last Name
DOB	Type of Referral Source
Referral Source First Name	Referral Source Last Name
Referral Source Primary Phone #	Current Guardianship Type
Legal Guardian: First Name	Legal Guardian: Last Name
Gender	Race
Insurance Coverage	MCO
School Type	Reason For Placement
Approximate Number of out-of-home Placements	Placement Type at time of referral (Before this Placement)

**Have these ready when you are adding all new referrals.**