SET Referral Review Tool
To be used to review referrals only

Referral Name:

Referral #:

Referral Received Date: Referral Closed Date:

Region: Program:

Social Workers assigned/involved during referral time period:

Reviewer’s Name and Title:

Date(s) of Review:

Documents Reviewed (Check all that apply):

☐ Delivered Services Log ☐ Investigative Narrative ☐ Safety Plan
☐ Case Consultation Forms ☐ Meeting referral/results ☐ SDM (list)_____
☐ History of Child Placements ☐ Genogram ☐ Court Reports:
☐ Importe d SOP Tools: ☐ Emergency Response Document (ERD) ☐ Ecomap

List any additional documents:

List the family members being reviewed (ex: Jane/mother; Jack/mother’s boyfriend; Tommy/child):

☐ The Referral was Unfounded (based on an accurate assessment)

Brief Summary of the Referral:
Directions: The purpose of this case review tool is to determine if case practice is consistent with the CWS Safety Enhanced Together (SET) key expectations. The referral record will be reviewed to evaluate case practice. The referral record refers to everything that is available in CWS/CMS and Structured Decision Making (SDM) reports. Reviewers may look at the hard file, but it is not required. If any concerns about safety or risk are identified while conducting this review, the reviewer is to notify their supervisor in a timely manner. The review time period (RTP) will start at the beginning of the month, for the six-month period.

- For example: If a SET Review is assigned in November 2015, the review time period will be 5/1/2015-10/31/2015

The reviewer is to consider the work done with the entire family when completing the tool. The “target child” is the child whose name/case number was assigned to the reviewer to complete the review. For each question the reviewer answers “Yes,” “No,” or “N/A.” The reviewer will then rate the question on the Likert scale below each question. For all answers, please put a brief reason why that answer was chosen in the comments box below the question. For questions with multiple participants/placements being rated, the reviewer can mark “Yes” for the question even if it only applies to one participant/placement. If the question does not apply to some family members/placement being rated, write “NO” or “N/A” next to the names of those family members/placements that do not apply. If none of the family members apply or meet criteria, mark the entire question as “No” or “N/A,” do not complete the Likert scale, and the reviewer can move on to the next question. The questions that require separate ratings will be identified by the specialized instructions included just above the rating scale.

For questions rating parents, the name and rating are to be written on the lines above the comments box for each parent. For any other key adult the social worker had contact with, you may write their name/relationship in the comments box with the rating next to their name.

- Example:

  - Rating multiple family members would look like this:

    Yes ✔ rate below
    No ___
    N/A ___

    Below the Likert scale mark:

    Mother: Sara/Emerging  Father: Paul/ No  Other: Step-Father Jack/ Emerging

    Comments:
    Father: Richard/ N/A - whereabouts unknown

Only mark one box on the Likert scale for each question. When selecting a box on the scale, choose the highest box where all criteria within the box have been met. If only some of the criteria have been met for a box, the box should not be marked. This scale is cumulative, and to meet the criteria for the higher boxes, you must also have done everything in the lower boxes.

For example:
• If all of the expectations for Novice have not been met, then mark “No” for the question and do not mark any of the boxes on the Likert scale.

• If all the criteria for Novice have been met, then determine if the criteria listed for Emerging have been met too. If all of the criteria for Emerging have not been met, then select Novice for the rating. If all the criteria for Emerging have been met, then move to Accomplished and so on.

• To achieve a score of Master, you would have to have met all the criteria in the boxes for Novice, Emerging, Accomplished, and Distinguished.

• Exceptions: There are specific circumstances where only applicable criteria need to be met in each box. One example is if the reviewer is rating a non-verbal child. Only criteria in each box that relates to non-verbal children would need to be met to move to the next box.

Comment boxes may be utilized to note positive practices or areas where practice could be improved. For all answers, please note the justification in the comments section. The reviewer has the option to complete the box at the end of the form to capture any overall feedback.

*Do not complete this review tool if any of the following apply: Referral was evaluated out; Social Worker (SW) was unable to locate the family; Family refused to speak with SW and no interviews were conducted.

Please list the reason for exclusion:
**Section 1**

1. Did the Hotline Screener use Safety-Organized Practice (SOP) techniques when speaking to the Reporting Party?

   - Yes  □ rate below
   - No  □
   - N/A  □ - Hotline report was faxed in; Hotline report was mailed in; PSW in region took report; There was no direct contact with RP; other (specify the reason in the comments box below)

**Connection to key expectations** - SOP; Community Partner Collaboration; Support Systems/ Safety Networks

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| • Basic questions about demographics and abuse/neglect were asked  
  • Identified at least one family strength  
  • Attempted to use Solution Focused Inquiry (SFI) - e.g. Asked a scaling question | In addition to Novice Practice:  
  - Information had behavioral detail - e.g. what substitute care provider behaviors are associated with concern, when do these behaviors happen, how they impact the child | In addition to Emerging Practice:  
  - Used Solution Focused Inquiry to successfully identify strengths, safety concerns, resources, and any acts of protection | In addition to Accomplished Practice:  
  - Attempted to obtain information on the family's support/safety network | In addition to Distinguished Practice:  
  - Provisional harm and danger statements were written and included in the ERD |

Comments:
2. Were attempts made to engage the family by using Safety-Organized Practice (SOP) tools/interventions during the investigation?

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<tr>
<td>N/A</td>
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Comments:
3. Was a genogram of the family created/updated, or was there information in narrative form about family connections?

Yes ☐ rate below  
No ☐  
N/A ☐ - safely surrendered baby; No information on parents or any family members and the child is non-verbal; other (specify in comment box below)

**Connection to key expectations** - Support Systems/Safety Networks; Comprehensive Assessments Enhanced by Agency Tools; Connection Preservation

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| • Documentation showed information about family connections | In addition to Novice Practice:  
• There is documentation or a genogram which identifies some extended family | In addition to Emerging Practice:  
• There is a genogram that includes nuclear family and extended family  
• If this was a removal – the genogram was completed to the 5th degree  
• If there is contact with both parents (or family members on both sides of the family), the genogram contains information on extended family members on both sides of the family | In addition to Accomplished Practice:  
• Genogram included family patterns, such as substance abuse, domestic violence, marriage, divorce, and/or mental health | In addition to Distinguished Practice:  
• Used the genogram to discuss family relationships with the parent(s) and all verbal children and their responses were documented in the narratives or incorporated into the genogram |

Comments:
4. Were questions asked regarding the cultural factors present in the family system?

-Culture is defined as: The sum total of an individual’s or family’s identity, including the learned behavior of a group passed on from generation to generation, e.g., values, beliefs, lifestyle, traditions, historical trauma, race, ethnicity, language, religion/spirituality, sexual orientation, gender expression, class, etc.

Yes □ rate below

No □

N/A □ - children non-verbal and no family members could be located; other (describe in comment box)

**Connection to key expectations** - Cultural Responsiveness; Open and Clear Communication; Family Partnerships

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<tr>
<td>• Documented the race / ethnicity of the family</td>
<td>In addition to Novice Practice: • Asked additional questions about cultural norms/practices/beliefs/traditions • Identified strengths from the family’s culture • If the family had NAH, attempted to gather specific information on family members and tribal affiliation so noticing could be done and tribal contacts could be established</td>
<td>In addition to Emerging Practice: • Attempted to provide culturally appropriate resources/referrals to the family</td>
<td>In addition to Accomplished Practice: • Discussed the family’s culture in relation to the allegations and/or protective issues -e.g. discussed differences between cultural practices and child abuse laws if applicable • If needed, additional research was done to gather more information about cultural norms/practices</td>
<td>In addition to Distinguished Practice: • Utilized cultural connections when doing safety planning OR creating/reviewing safety/support networks with the family</td>
</tr>
</tbody>
</table>

Comments:
5. Was the family assisted with identifying and maintaining a support system/safety network?

Yes □ rate below

No □

N/A □ - Parent’s whereabouts have been unknown for the entire RTP; Other (specify the reason in the comments box below)

*To answer this question, reviewers may need to look outside the RTP.*

**Connection to key expectations** - Support Systems/Safety Networks; Open and Clear Communication; Family Partnerships; Comprehensive Assessments Enhanced by Agency Tools

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<td>- At least one family member was asked about their support system</td>
<td>In addition to Novice Practice: - Explained to the family why the information on their supports was being obtained and what network members need to know - Contact information for the identified supports was documented</td>
<td>In addition to Emerging Practice: - An ecomap and/or Circles of Safety and Support Tool was used to identify support system / safety network members and their relationship to the family - Formal and informal supports were identified - Contact with the identified supports was attempted during the investigation</td>
<td>In addition to Accomplished Practice: - All verbal family members that the SW was in contact with were asked about their support system / safety network at least once during the investigation - Attempted to set up a FCM with identified support system / safety network members during the investigation - Specific Roles were identified by the support system / safety network members and documented - Discussed methods for keeping everyone informed</td>
<td>In addition to Distinguished Practice: - Checked in with the support system / safety network more than once during the investigation to assess effectiveness - If needed - made adjustments by adding or removing network members or changing their responsibilities during the investigation</td>
</tr>
</tbody>
</table>

Comments:
6. Was the family educated about child abuse laws?

   Yes □ rate below

   No □

   N/A □ - safely surrendered baby; parent(s) refused to speak with the SW; Other (specify in the comments box below)

***Rate this question for each parent that is involved with the referral. The ratings are to be written on the lines above the comments box. For any other parents, the rating should be labeled with their name and written in the comment box.

Connection to key expectations - Family Partnerships; Open and Clear Communication; Support Systems/Safety Networks

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<tr>
<td>• Told the parent(s) about child abuse laws</td>
<td>In addition to Novice Practice:</td>
<td>In addition to Emerging Practice:</td>
<td>In addition to Accomplished Practice:</td>
<td>In addition to Distinguished Practice:</td>
</tr>
<tr>
<td></td>
<td>• Educated parent(s) about child abuse laws</td>
<td>• Problem solved with the family</td>
<td>• Gave the family an opportunity to voice their understanding of child abuse laws and the reason for the SW’s visit</td>
<td>• Attempts made to contact support people identified by the family</td>
</tr>
<tr>
<td></td>
<td>• Related the law to the reason why we were there and any concerns - e.g. discussed differences between cultural practices and child abuse laws, if applicable</td>
<td>• Asked the family about their support system/safety network</td>
<td>• If contact made, attempted to educate them on child abuse laws</td>
<td></td>
</tr>
</tbody>
</table>

Please write in the name/rating for each parent:

Mother:          Father:           Other:           Other:

Comments:
7. Were attempts made to connect the family with community resources and/or services, or assess services the family was already receiving?

Yes ☐ rate below

No ☐

N/A ☐ - Safely surrendered baby; Children in adoptions and parental rights are terminated; No safety threat/concerns identified and no referrals/services assessed to be needed at this time; Other (specify in comments box below)

**Connection to key expectations** - Support Systems/Safety Networks; Cultural Responsiveness; Comprehensive Assessments Enhanced by Agency Tools; Community Partner Collaboration

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<td>• Provided family with a general list of resources or verbally provided information on general referrals</td>
<td>In addition to Novice Practice:</td>
<td>In addition to Emerging Practice:</td>
<td>In addition to Accomplished Practice:</td>
<td>In addition to Distinguished Practice:</td>
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<tr>
<td>OR</td>
<td>• Provided specific referrals</td>
<td>• Asked the family about barriers to connecting to services</td>
<td>• Attempted to contact providers to facilitate service provision with family</td>
<td>• Followed-up with the family to see if they made contact with new providers or have been maintaining contact with existing providers</td>
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<tr>
<td>-If already in services</td>
<td>• Explained nature/type of service and how will meet family’s need</td>
<td>• Completed an eco-map</td>
<td>• Discussed family’s culture (including any NAH) to ensure referrals/services met their needs</td>
<td>-If already in services</td>
</tr>
<tr>
<td>• Asked the family about services the they were already receiving</td>
<td>OR</td>
<td>• If already in services</td>
<td>-Attempts were made to conduct joint visits with service providers to help engage/maintain the family in their services</td>
<td></td>
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<td>OR</td>
<td>• Asked family about their needs and if they were being met by existing service providers</td>
<td>• Asked about any barriers to continuing with services</td>
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Comments:
8. Were the family’s strengths, acts of protection, and/or protective capacities identified?

Yes ☐ rate below

No ☐

N/A ☐ - (Specify reason in the comments box below)

**Connection to key expectations** - Comprehensive Assessments Enhanced by Agency Tools; SOP; Family Partnerships; Child/Youth Voice

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<tr>
<td>• At least one family strength was identified</td>
<td>In addition to Novice Practice:</td>
<td>In addition to Emerging Practice:</td>
<td>In addition to Accomplished Practice:</td>
<td>In addition to Distinguished Practice:</td>
</tr>
<tr>
<td>• Attempted Solution focused inquiry or other SOP tools</td>
<td>• At least one act of protection or protective capacity for the family was identified</td>
<td>• There was documentation on how these acts of protection have mitigated some or all safety threats/concerns</td>
<td>• Identified acts of protection were used to discuss safety planning, if needed</td>
<td>• Assessed the family’s progress in utilizing acts of protection more than once during the time the referral was open -E.g. During interviews, during supervision, while writing Investigative Narrative, etc.</td>
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<td></td>
<td>• Used Solution Focused Inquiry or SOP tools with more than one family member involved with the referral -e.g. both parents</td>
<td>• Included the child(ren)’s voice</td>
<td></td>
<td>• Practiced Solution Focused Questions with the family more than once during the time the referral was open</td>
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Comments:
9. During the course of the investigation were all safety threats accurately identified and documented?

Yes (All safety threats were identified) □ - Rate Below and Complete Section 2

No (There were safety threats that were not identified) □ - Explain and Do Not Complete Section 2

N/A: □ - There are no Safety Threats to be identified; Other (specify in comments box below)

Connection to key expectations - Comprehensive Assessments Enhanced by Agency Tools; SOP; Child/Youth Voice; Family Partnerships; Open and Clear Communication

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<tr>
<td>• All safety threats were accurately documented in CWS/CMS</td>
<td>In addition to Novice Practice:</td>
<td>In addition to Emerging Practice:</td>
<td>In addition to Accomplished Practice:</td>
<td>In addition to Distinguished Practice:</td>
</tr>
<tr>
<td>• All safety threats were identified and documented in both CWS/CMS and SDM</td>
<td>• Safety threats were documented in CWS/CMS using behaviorally descriptive language demonstrating the extent and impact of the safety threat - e.g. What needs to change in order for children to be safe</td>
<td>• The family was given an explanation of the impact and extent of safety threats</td>
<td>• The family was involved in safety planning conversations</td>
<td>• The voice of the child(ren)/youth and family was used when describing the impact of the safety threats</td>
</tr>
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</table>

Comments:

- If you answered “Yes” to Question #9 - Please Complete Section 2.

- If you answered “No” or “NA” to Question #9 - Skip Section 2 and go to the last page to provide overall feedback on this referral.
Section 2

10. Were the safety threats and Agency’s concerns described to the family?

Yes □ rate below

No □

N/A □ - Parent’s whereabouts were unknown for the entire RTP; Parents were unresponsive to outreach; Other (specify in comments box below)

***Rate this question for each parent that is involved with the referral. The ratings are to be written on the lines above the comments box.

Connection to key expectations – Open and Clear Communication; SOP; Family Partnerships

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<tr>
<td>• The family was given an explanation about the need for Agency intervention</td>
<td>In addition to Novice Practice:</td>
<td>In addition to Emerging Practice:</td>
<td>In addition to Accomplished Practice:</td>
<td>In addition to Distinguished Practice:</td>
</tr>
<tr>
<td>• The family was provided with a clear understandable explanation about the need for Agency intervention</td>
<td>• Included behavioral detail in the harm and danger statements</td>
<td>• Included impact to the child</td>
<td>• Asked the family about their understanding of safety, harm, and danger as it related to their investigation / family situation</td>
<td>• A FCM was held</td>
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<tr>
<td>• Used the terms of safety, harm, and danger</td>
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<td></td>
<td>• The child(ren) / youth and family’s voice was included in the safety, harm, and danger statements</td>
<td>• Safety, harm, danger and impact to the child were discussed with the family more than once</td>
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<td></td>
<td>• Attempted to hold a FCM</td>
<td>• The family’s voice was obtained more than once</td>
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Please write in the name/rating for each applicable family member:

Mother: Father: Other: Other:

Comments:
11. If a Safety Plan was implemented did it effectively address the safety threat?

Yes ☐ rate below

No ☐ (The safety plan did not address the safety threat – Explain in comments box below)

N/A: ☐ - No Safety Plan was implemented; Safety Plan was not reviewed (not imported in CWS or was not in case file); other (specify the reason in the comments box below)

**Connection to key expectations** - SOP; Family Partnerships; Support Systems/Safety Networks

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<tr>
<td>• A Safety Plan was developed that addressed the safety threat(s)</td>
<td>In addition to Novice Practice:</td>
<td>In addition to Emerging Practice:</td>
<td>In addition to Accomplished Practice:</td>
<td>In addition to Distinguished Practice:</td>
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<tr>
<td>• The Safety Plan was behaviorally specific</td>
<td>• A Safety Plan was developed which was: SMART-specific, measurable, attainable, relevant, and time-bound</td>
<td>• Attempts were made to include the safety network in the safety plan</td>
<td>• Attempts were made to include all involved/appropriate household members in the plan</td>
<td>• At least one follow-up was conducted on the effectiveness of the interventions</td>
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<td>• The parent(s) were included in the development of the plan</td>
<td>• Changes were made if any issues were identified</td>
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<td>• The plan was written in the family’s language</td>
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Comments:
12. Was the impact of trauma on the child/youth's emotional, social, and physical development assessed if a safety threat was identified?

Yes □ rate below
No □
N/A □ - (specify the reason in the comments box below)

***Rate this question for each child in the family. The ratings are to be written on the lines above the comments box.

Connection to Key Expectations - Comprehensive Assessments Enhanced by Agency Tools; Child/Youth Voice; Behaviorally Descriptive Case Plans; Support Systems/Safety Networks; Community Partner Collaboration

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<td>• Information on emotional, social, and physical development was gathered from the parent(s), teachers, or other people in the support system who may have contact with the child/youth</td>
<td>In addition to Novice Practice:</td>
<td>In addition to Emerging Practice:</td>
<td>In addition to Accomplished practice:</td>
<td>In addition to Distinguished practice:</td>
</tr>
<tr>
<td>• Attempts were made to obtain records or reports about child/youth's emotional, social, and physical functioning, if applicable</td>
<td>• Child/youth's interactions with parent(s) were observed at least once during the RTP</td>
<td>• Had a trauma-informed discussion with verbal child(ren) / youth about how they are doing</td>
<td>• Followed-up with service providers on any referrals that were made</td>
<td>• Made any changes to services, goals, or service providers as needed</td>
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<td></td>
<td>• Followed-up on information provided by child/youth's support system and referrals were made to service providers as needed -e.g. For services such as developmental services, DSEP, counseling, social skills group, Pathways Screening, etc.</td>
<td>• Asked the child(ren) / youth what changes they would like to see</td>
<td>• Attempted to get support system together to assess progress and address any issues -e.g. Child and Family Team Meeting, treatment team meeting, wrap team meeting, or other FCM</td>
<td>• Followed up on any needs identified by family or support system</td>
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<td>• If child non-verbal, asked parent(s) if current services being provided were helpful</td>
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<td>• Followed up on any action items from the FCM, if one was held</td>
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Please write in the name/rating for each child:

Child: Child: Child: Child:
Child: Child: Child: Child:

Comments:
13. Was the family educated on how the abuse and/or neglect impacts the child(ren)/youth?

Yes □ rate below

No □

N/A □ - Parents refused to speak with the SW; Other - Explain in comments box below)

***Rate this question for each parent that is involved with the referral. The ratings are to be written on the lines above the comments box.

**Connection to key expectations** - Open and Clear Communication; Family Partnerships; Child/Youth Voice; Comprehensive Assessments Enhanced by Agency Tools

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<td>• Discussed impact of the trauma on the child(ren)/youth with the parent(s)</td>
<td>In addition to Novice Practice:</td>
<td>In addition to Emerging Practice:</td>
<td>In addition to Accomplished Practice:</td>
<td>In addition to Accomplished Practice:</td>
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<td>• Explanation of the impact (or future impact) of the specific trauma on the child(ren) / youth was clearly and specifically documented</td>
<td>• The parent(s) jointly identified ways in which the abuse/neglect has impacted their child(ren) / youth</td>
<td>• Included the voice of the child(ren) / youth in the explanation</td>
<td>• Assessment was done of the family’s understanding of the impact and the actions they need to take to help their child (ren) / youth more than one time during the referral</td>
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<td>• Behavioral detail was given</td>
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Please write in the name/rating for each applicable parent:

Mother: Father: Other: Other:

Comments:
14. Was a Family Centered Meeting (FCM) held with the family to address the Safety Threat?

Yes ☐ rate below

No ☐

N/A: ☐ - (Specify in the comments box below)

- Attempts were made to schedule a FCM, but one was not held ☐

**Connection to key expectations** - Comprehensive Assessments Enhanced by Agency Tools; Community Partner Collaboration; Family Partnerships; Child/Youth Voice; Open and Clear Communication; Support Systems/Safety Networks; Aftercare Plans

<table>
<thead>
<tr>
<th>☐ Novice</th>
<th>☐ Emerging</th>
<th>☐ Accomplished</th>
<th>☐ Distinguished</th>
<th>☐ Master</th>
</tr>
</thead>
<tbody>
<tr>
<td>• A FCM was held, -e.g. mapping, Family Group Conferencing, etc.</td>
<td>In addition to Novice Practice: • The FCM only included or attempted to include informal supports</td>
<td>In addition to Emerging Practice: • The FCM included or attempted to include formal and informal supports for the family • The child(ren)’s/youth’s voice was incorporated in the meeting (child(ren) to be present if possible)</td>
<td>In addition to Accomplished Practice: • Followed-up with family on action plan agreed upon in the meeting</td>
<td>In addition to Distinguished Practice: • Followed-up with all parties on agreed upon actions • Information obtained from parties was used to make adjustments in the plan and/or provide feedback to parties on progress on goals</td>
</tr>
</tbody>
</table>

Comments:
*Complete box below if there is any overall feedback from the review

What's Working Well? :

What are You Worried About? :

What Needs to Happen Next? :