

Student Name:

Date Completed:

# Case Record Format and Electronic Systems

1. Go into the Policy Manual and familiarize yourself with the different types of forms for your program area.
2. Have a co-worker (chosen by your supervisor) assist you in gathering the forms needed to set up a case record. Record the forms needed to set up a case record below:
  
3. See if you can locate all of these forms in the Policy Manual.
4. Place the forms in the correct sessions of the case record as identified by the case record cover sheet.
5. Have your co-worker go through the various electronic systems used by your program area and provide a brief description of each. Record the description of the electronic systems listed below.
  - FACTS – Family, Adult, and Child Tracking System
  
  - ERD Reports
  
  - CAN – Child Abuse Neglect Registry
6. Have your co-worker show you how to open a case in the electronic system most frequently used by your program area. Record the steps here:

7. Have your co-worker show you how to create a Comprehensive Family Assessment (CAF) and Individualized Service Plan (ISP) in FACTS. Record the steps here:

8. Tell your co-worker that you also need to see how a case is closed in FACTS. Ask your co-worker if they will show you the steps to do this next time they have to close a case in the electronic system here:

**I discussed the following with my supervisor regarding on-line forms, case record formatting, and the electronic systems:**