

The proposed training format will include two training courses for each new hire:

1. [System] Overview Training
2. Department-Specific Peer-to-Peer Training

These training courses are explained below.

1. [System] OVERVIEW TRAINING

Audience: All new hires in departments who use [System].

POC: T**** H****

Format: Video

Duration: Estimated 10 minutes

Timeline: Completed in the first week of employment, as part of the onboarding process.

Purpose: This training will serve to provide new staff with a foundational understanding of what [System] is, why it's important, and how it supports the organization's foster care placement and compliance processes across departments.

It will establish a conceptual framework before diving into task-specific training later in onboarding (e.g., how to log a placement search or upload a document) and avoid overwhelming new hires by showing how the pieces fit together before introducing detailed processes.

Proposed content:

- What is [System] and why does it matter?
 - *Explain how [System] is used to manage foster placements, payment tracking, documentation, and compliance.*
 - *Emphasize its importance in ensuring accurate data entry and timely actions, especially in emergency situations.*
 - *Understand the link between [System] and [STATE SYSTEM], the state system. Information is often transcribed directly from [STATE SYSTEM] into [System].*
- How is [System] used across departments?
 - *Give a high-level overview of which teams (e.g., placement, finance, compliance) interact with [System] and for what purposes – brief explanations are below.*

Roles of Departments

Intake: The intake department is responsible for initiating and tracking both emergency and nonemergency placement searches for children entering care. Staff log detailed placement efforts, document agency responses, upload required forms like placement confirmations and authorizations, and finalize placements in the system. Emergency removals require urgent manual data entry and four-hour response times, while nonemergency cases involve planned transfers. The department ensures accurate records, facilitates communication with providers, and supports timely, appropriate placements for children.

Permanency: The Permanency department manages foster care cases after a child is removed from their home, supporting both children and parents for up to one year through services, visits, and case monitoring to achieve a safe, permanent outcome. Unit Administrative Specialists support this work by submitting and managing service authorizations in [System], handling approvals, ensuring providers receive documentation, and maintaining accurate records. They also create new cases, import participants from [STATE SYSTEM], and manage edits or reports to ensure services are correctly assigned and tracked.

Care Management: The Care Management department monitors placement stability and supports coordination between providers and internal teams. They ensure children receive authorized services, flag missing documentation, and report concerns such as provider non-responsiveness or discharge issues. Care Managers often act as the first line of support when a provider raises concerns or fails to meet expectations. They also use [SYSTEM] to review provider information, track placement availability, and contribute insights that support compliance reviews and decision-making.

Quality and Compliance: The Quality and Compliance department ensures operational integrity by managing contracts, enforcing standards, and resolving discrepancies in [System]. They oversee vendor profiles, verify documentation (e.g., licenses, rates, incident reports), and audit payments to prevent errors. Q&C investigates provider issues, such as missed placements or billing disputes, and mediates conflicts (e.g., wrongful discharges). They track incidents (e.g., abuse allegations) and document the outcomes. The team collaborates with finance, data, and intake teams to align payments, placements, and compliance. Additionally, Q&C trains staff and providers on system workflows and regulatory requirements, acting as both auditors and problem-solvers to maintain compliance and smooth operations. Q&C often uses the whole [System] system.

Data Entry: The Data Entry team is responsible for inputting accurate and timely information into [System], including placements, service authorizations, and provider

records. Their work ensures that all client and provider data align with the state system ([STATE SYSTEM]), enabling smooth service delivery and internal processes.

Responsibilities include troubleshooting common errors, navigating [System] efficiently, and validating records to prevent discrepancies. The team creates and updates records that directly [State system] provider payments, internal billing, and care tracking across departments.

Data Quality: The Data Quality team audits and validates the information entered into [System] to ensure accuracy for billing, reporting, and compliance. They compare [System] data against [STATE SYSTEM], resolve discrepancies, and maintain clean financial records that support timely provider payments. This team plays a vital role in financial oversight, reviewing provider invoices, monitoring data integrity, and supporting audits. Their work is essential to financial integrity and organizational accountability.

PAL: PAL (Preparation for Adult Living) services assist youth 16 or older in identifying and developing support systems and housing for when they leave care. This includes facilitating circle of support (COS) meetings, conducting Independent Living Skills Assessments, providing individualized support services to youth such as vocational training, driver's education, and counseling, and providing case management services while the youth is receiving financial assistance. Currently, [System] is used by PAL to run reports to view completed trainings, assessments, what documents the children have, and the date of their last circle of support.

- *SME has indicated that it would be helpful to have a place to put and keep track of extended care forms, SIL (supervised independent living) referrals, placement forms (these are all needed to apply for state funding). Currently their tracking databases are maintained in Excel spreadsheets.*
 - *This is not in the scope of this training but is a consideration for the future*

2. DEPARTMENT-SPECIFIC PEER-TO-PEER TRAINING GUIDES

Audience: All new hires who will use [System], including staff transferring into the department.

POC: Listed for each department below.

Format: Peer-to-peer training guide: a standardized department checklist + hands-on practice with a trainer present.

Duration: between 1-4 hours, depending on the complexity of each department's tasks.

Timeline: Taken when the new hire begins their work in [System], estimated end of the first week or beginning of the second week.

Purpose: These guides provide a structured, department-specific roadmap for learning the most essential [System] tasks. An assigned on-the-job trainer, either a peer or supervisor from the same department, will lead the training. They will be given a checklist of tasks and topics to cover, walk the new hire through each task, offer hands-on demonstrations, and give real-time feedback. This approach also allows trainers to highlight program nuances, common issues, recommended workflows, and department-specific best practices.

Each trainer will:

- Demonstrate each task in the live system.
- Let the new hire practice each task.
- Point out common errors or troubleshooting tips.
- Share any program-specific workflows or preferences.

Content:

- Trainer Toolkit
 - Checklists: Each department's key tasks with subtasks and common errors.
 - Quick-Reference Sheets: One-pagers with top 3 tasks, troubleshooting tips.
 - New Hires also receive these materials so they can take notes and reference them later.
- Standardized Session Structure
 - Demonstrate: Trainer shows the task in live [System].
 - Practice: New hire performs the task with guidance.
 - Troubleshoot: Trainer shares common pitfalls (ex: "[System] does not always save this field correctly, so we check here to make sure it updated correctly").

- Connect: Explain how the task affects other teams (ex: "Your placement entry triggers Service Authorization billing").
 - Post-Training Validation
 - 5-Question Quiz: Confirms baseline understanding (ex: "What's the first step when you receive an emergency removal request?").
-

Each section below outlines the most critical [System] tasks for a given department. These will be expanded with instructions, key considerations, and known system quirks.

Intake

POC: E**** W*****

Main topics:

- Enter placement requests for emergency and nonemergency situations.
 - Entering new-child information manually for emergency removals.
 - Using existing case data for nonemergency moves, for children who are already in care.
 - Submitting placement requests with the correct request type and timeline.
 - Perform and log placement searches.
 - Recording which providers were contacted.
 - Tracking responses (acceptances, denials, partial acceptances, nonresponses, and reasons given).
 - Maintaining clear documentation about the search.
 - Finalize and document placement details.
 - Entering key details like start date, level of care, service package, and placement type.
 - Recording the final placement to initiate the next placement activities.
-

Permanency

POC: T***** M***** & S***** R*****

Main topics:

- Review key documents in [System].
 - Locating incident reports, service levels, and provider uploads (such as counseling notes).

- Checking regularly for new uploads, especially incident reports.
 - Accessing documentation of placement search efforts for legal or audit purposes.
 - Manage service authorizations.
 - Submitting and editing service requests with correct providers, unit counts, and approvers.
 - Viewing request status to confirm submission, approval, and delivery.
 - Import and update case information from [STATE SYSTEM].
 - Starting new cases and validating key details like addresses.
 - Adding case participants such as family members or fictive kin.
 - Search and retrieve case data.
 - Using multiple search methods (such as case number, name, PID, county).
 - Exporting relevant provider lists (such as PCS services).
-

Care Management

POC: B**** D*****

Main topics:

- Manage and review documents critical to care coordination.
 - Accessing and reviewing critical documents such as discharge notices, level of care waivers, incident reports, and utilization reviews.
 - Tracking uploaded files, such as therapy notes, and flagging missing or incomplete submissions.
 - Accessing and using the child face sheet, including placement history, PID numbers, and associated staff.
 - Adding oneself as staff for child cases to receive automated alerts, such as discharge notices.
- Service compliance and follow-up.
 - Verifying that providers deliver contracted services by cross referencing documents such as service authorizations, CANS assessments, incident reports, and utilization reviews.
 - Monitoring and responding to incident reports to check for serious incidents and identifying new incident reports even if they have not yet been worked or categorized.
- Systems and transition support.
 - Supporting transition between YFT to T3C.

Quality and Compliance

POC: A***** P*****

Main topics:

- Manage and track provider contracts.
 - Entering in contract details, such as vendor information, rates, and documents.
 - Uploading and managing contract documents, including renewals/expiration.
 - Logging contract notes as they arise.
 - Checking placement availability and verifying provider contact details to support placements.
- Payment and billing discrepancies.
 - Ensuring correct service authorizations and rates for providers and vendors.
 - Investigating payment discrepancies.
 - Tracking invoices and service requests to validate billing claims.
- Monitor compliance.
 - Auditing providers and vendors.
 - Running compliance reports, such as call logs, discharge notices, and service requests.
 - Monitoring and entering compliance reports, such as background checks, incident reports, and RTB (reason to believe) reports.
- Support staff and providers.
 - Assisting staff in navigating provider-related challenges, such as when a provider wants to discharge a child.
 - Mediating between staff and providers by referencing contracts and expectations.

Data Entry

POC: T**** H****

Main topics:

- Navigate [System] and look up records.
 - Search for children, view documentation, and access records as needed.
 - Maintain organized workflows for data entry processes.
- Enter and validate placements, service authorizations, and new homes.
 - Input data into [System], ensuring required fields such as dates, levels of care, and prescribed services align with [STATE SYSTEM].
 - Verify that entries are complete and error-free before submission.
- Ensure data consistency.
 - Cross-check entries with [STATE SYSTEM] to prevent mismatches before finalizing.
- Troubleshoot common entry errors.
 - Use standard operating procedures, internal guides, and tip sheets to resolve frequent issues such as missing fields and system errors.

Data Quality

POC: K**** S****

Main topics:

- Perform data quality checks
 - Use dashboards/reports to flag discrepancies such as date mismatches and billing codes between [System] and [STATE SYSTEM].
 - Investigate and resolve inconsistencies impacting billing/payments.
- Validate financial data
 - Verify rates, service authorizations, and placements meet state/contract requirements.
 - Audit provider invoices against [System] records; enter/maintain rate data.
 - Resolve invoice issues with providers.
- Support audits & reporting
 - Ensure data accuracy for compliance reviews.
- Track systemic issues
 - Identify recurring errors, document trends, and collaborate on fixes.

PAL (Preparation for Adult Living)

POC: M*** P*****

Main topics:

- How to run reports.
 - Finding documentation about completed trainings, assessments, what documents children have, supervised independent living (SIL) referrals, and placement forms.