



# PARB DATABASE USER'S GUIDE

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# Introduction

This document is meant for users of the PARB database web application located at <https://occy.eteam.ou.edu/#/>.

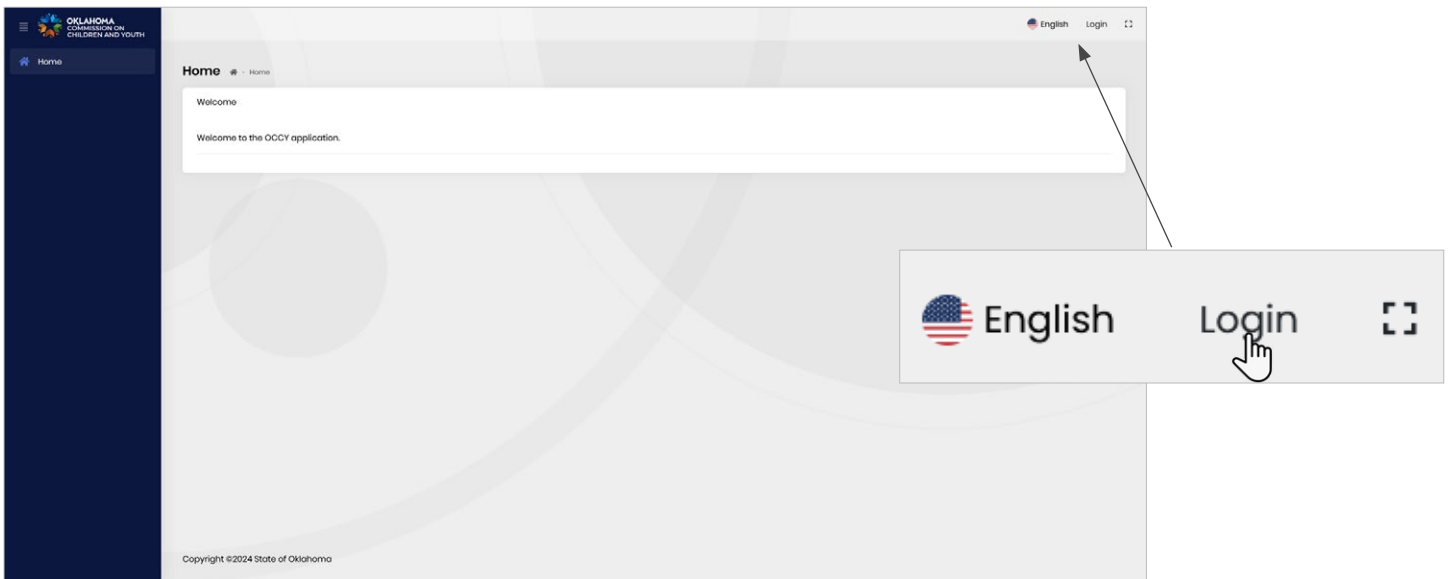
The PARB database was designed to allow PARB members who serve on the post adjudication review boards to enter review and recommendation data electronically to be submitted to the courts. This database is used for case management, tracking cases and case details, and is meant to improve data collection processes and analysis so that PARB can make data informed decisions and recommendations.

In this guide you will find information on the steps you need to take to complete certain tasks within the application. We have included screenshots alongside this icon () to help guide you through the steps you need to enter information. The hand icon indicates specific links, buttons, and parts of the application that you can click on to complete an action.

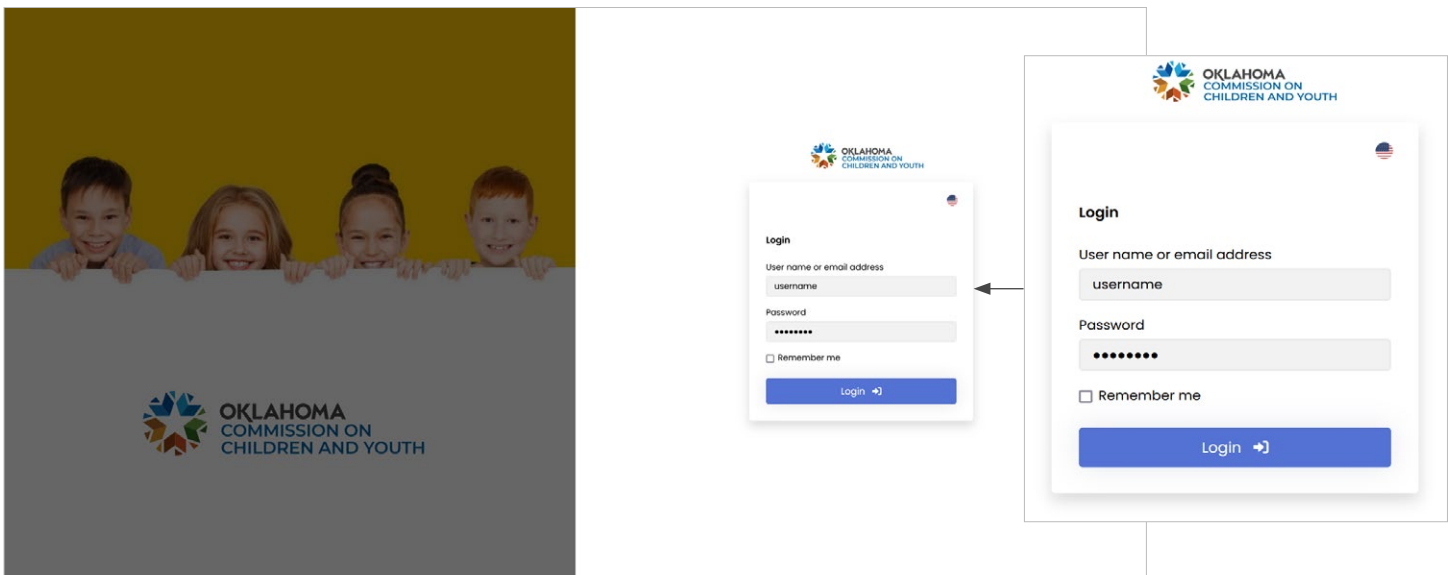
# Logging Into the Database

New PARB members will receive an email with their login information. Contact Keith Pirtle @ keith.pirtle@occy.ok.gov if you do not receive an email. Once PARB users receive their login credentials, they will enter **occy.eteam.ou.edu** into the URL bar. The **Login** button is located in the top right corner of the page.

After selecting the **Login** button, a screen will appear, allowing the user to enter their login credentials.



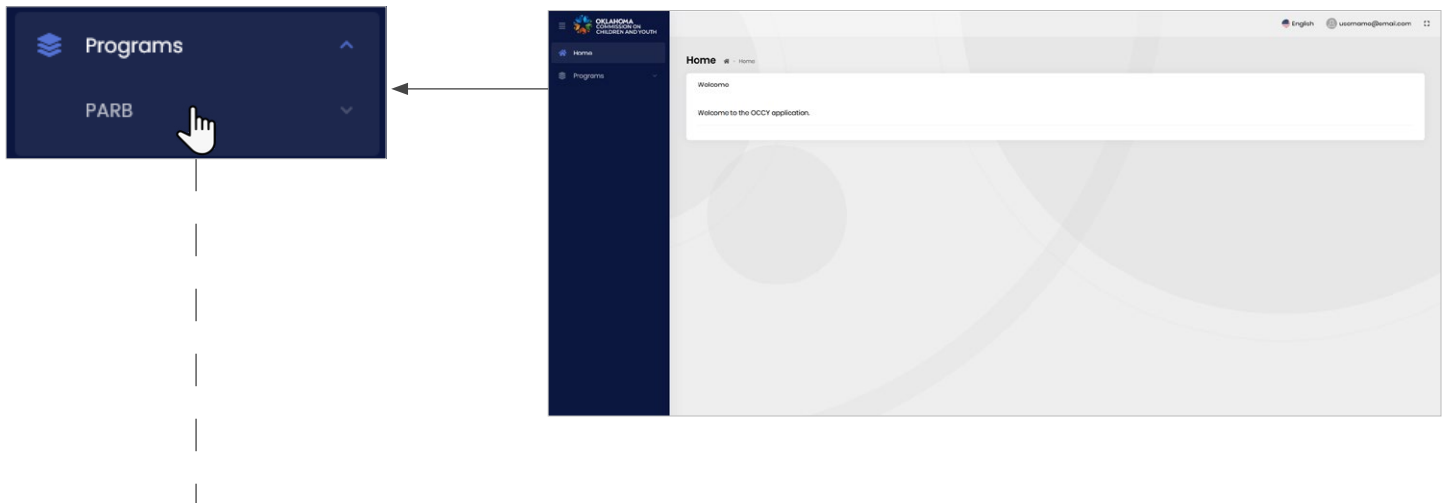
The user will enter their username (email) and password.



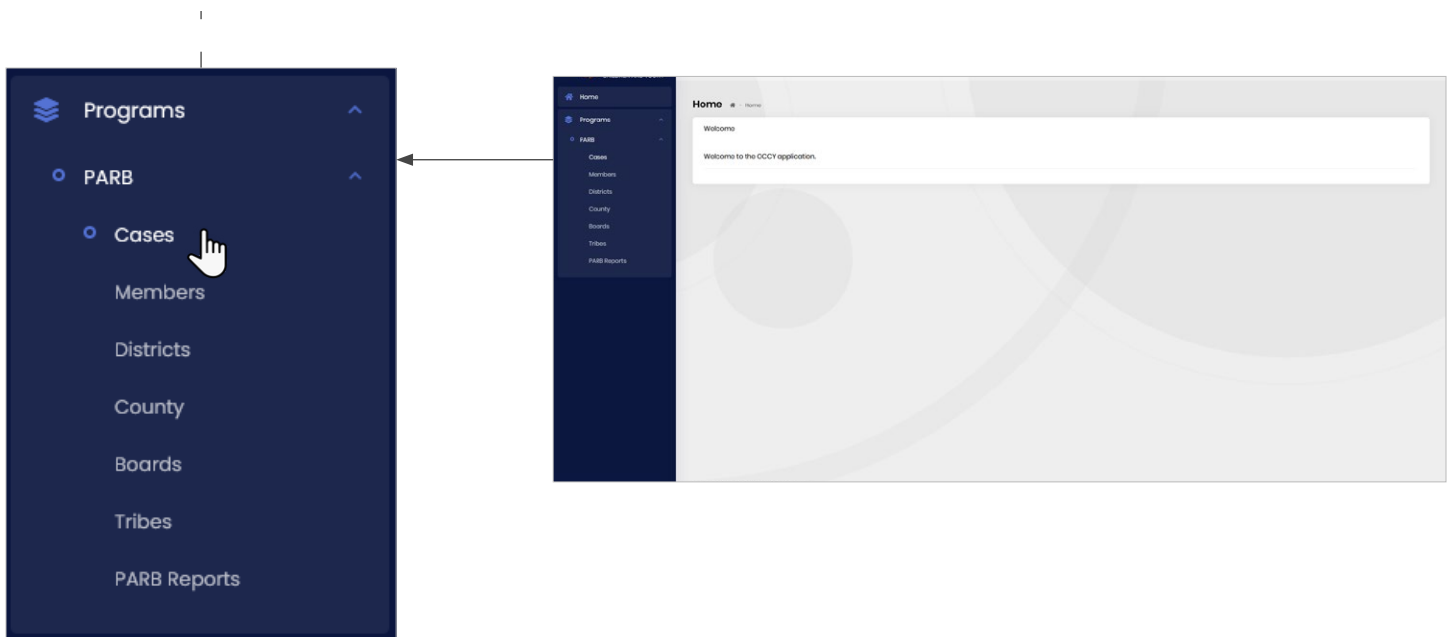
## Exploring the Home Page

Getting familiar with the home page is essential to using the OCCY database effectively.

On the far-left side of the page is a menu; by selecting the **PARB** program, the **Cases** button will appear.



Clicking on the **Cases** button will bring the user to the main cases page, where all cases are listed and where the user will create new cases and reviews and search for cases and/or reviews.



## Functions on the Cases Page

The main cases page is where the user will see a list of all cases. Other information listed on the cases page includes:

- Board
- JD/JDL/KK #
- Review of (name of review)
- Last Review
- Next Review
- All Reviews
- Add Review
- Actions (close a case and download full summary report).

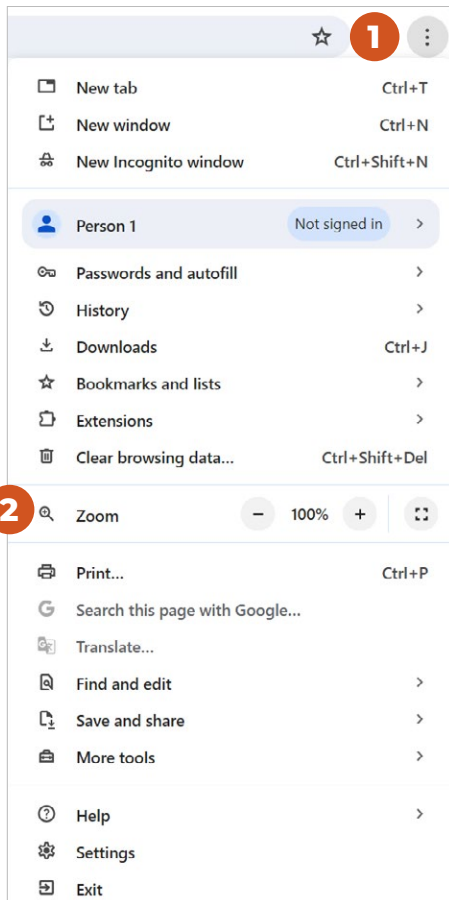
The cases page is also where a user can **search cases** and **add new cases or reviews**.

The screenshot shows the 'Cases' page interface. At the top, there are two callout boxes: 'Advanced Search' and '+ New Case'. The 'Advanced Search' box points to a search bar on the page. The '+ New Case' box points to a button on the page. The page header includes 'Cases', 'Programs', 'PARB', and 'Cases'. The main content area has a table with columns: #, Board, JD/JDL/KK, Review Of, Last Review, Next Review Date, All Reviews, Add Review, and Actions. The table contains three entries. Below the table, it says 'Showing 1 to 3 of 3 entries'.

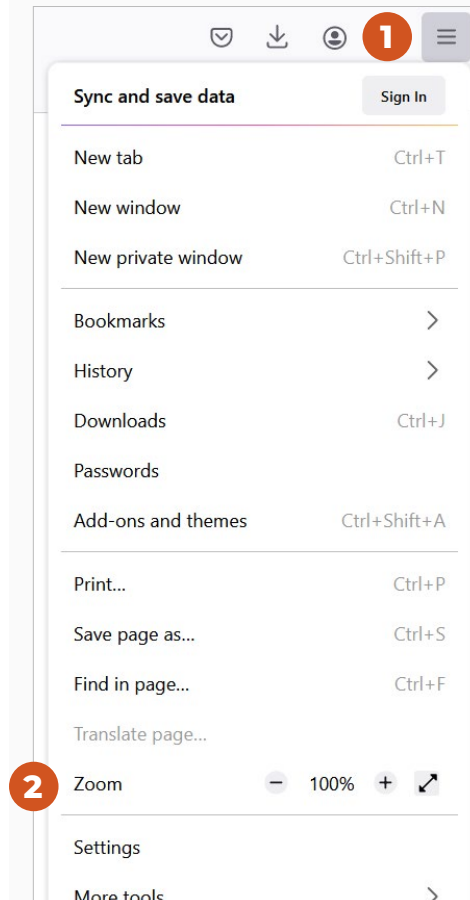
| # | Board      | JD/JDL/KK      | Review Of      | Last Review | Next Review Date | All Reviews | Add Review | Actions        |
|---|------------|----------------|----------------|-------------|------------------|-------------|------------|----------------|
| 1 | Test Board | JD#: 2021-0006 | Arias Family   | 04/11/2024  | 10/09/2024       | (1) review  | Add        | Print Download |
| 2 | Test Board | JD#: 2021-0003 | Johnson Family | 04/09/2024  | 10/09/2024       | (1) review  | Add        | Print Download |
| 3 | Test Board | JD#: 1234-0001 | Wilson Kids    | 04/09/2024  | 09/11/2024       | (1) review  | Add        | Print Download |

## Pro Tip #1

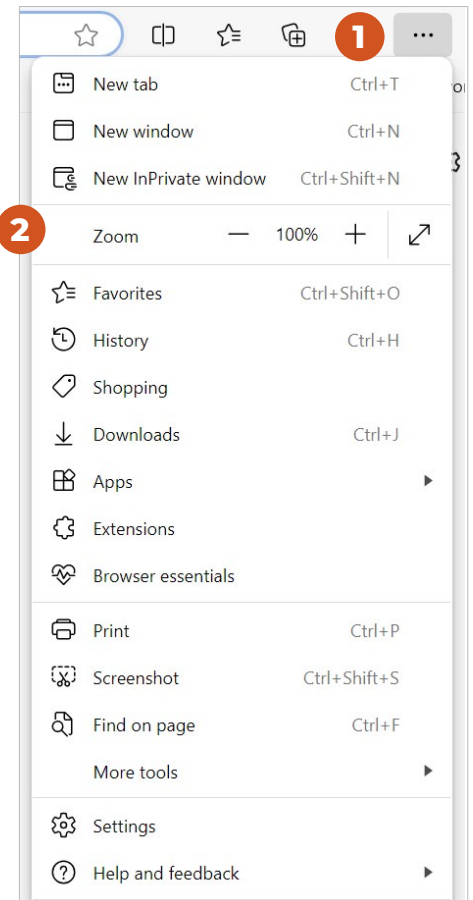
If all buttons are not visible when looking at the cases page, the user may have to adjust their screen size by following these steps.



1. Locate and click on the three dots at the end of the url bar at the upper right of the screen.
2. Find the zoom function and decrease to 80%.



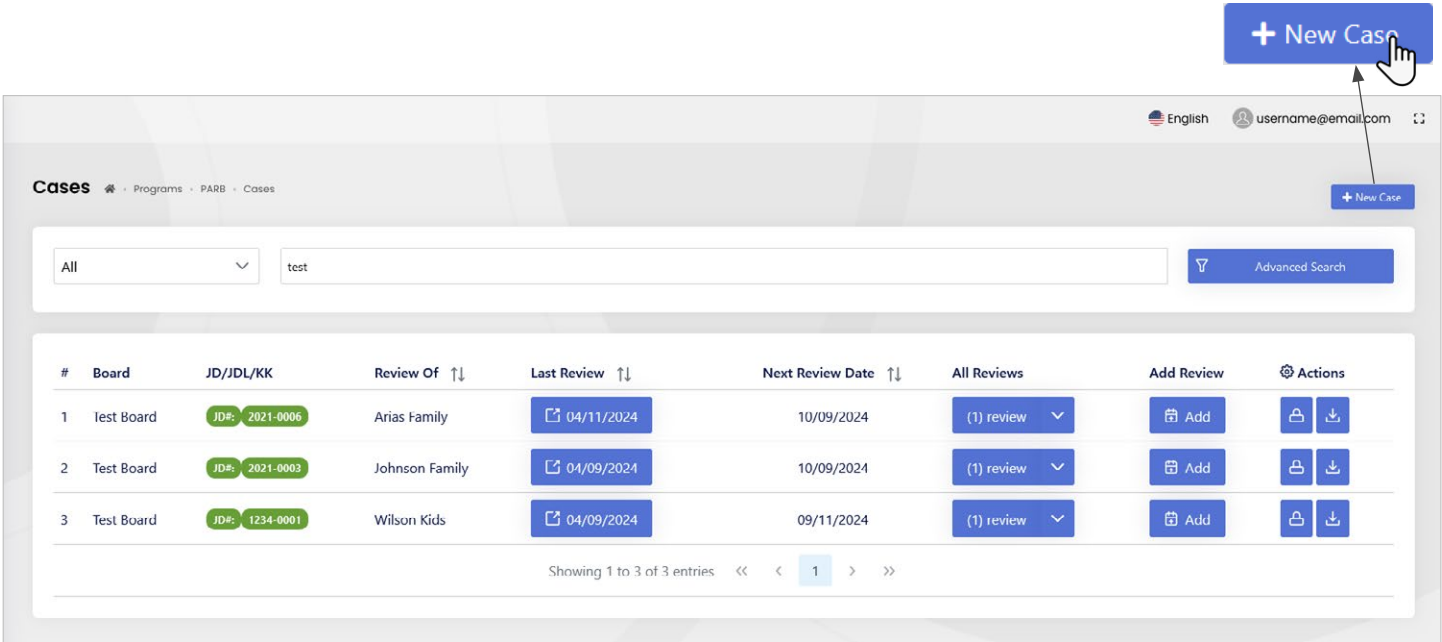
1. Locate and click on the three lines at the end of the url bar at the upper right of the screen.
2. Find the zoom function and decrease to 80%.



1. Locate and click on the three dots at the end of the url bar at the upper right of the screen.
2. Find the zoom function and decrease to 80%.

# Creating a New Case

In the top right-hand corner of the main cases page, a user can create a new case by clicking, the **+New Case** button. The user will then enter all information needed to set up a case.



**!** Adding a new case should only be done when setting up a new case and initial/first review. After a case is established the user will add reviews to the existing case.

# Entering the First Review

When entering the initial review, the user will complete information in each of the following screens:

- Case
- Courts
- Review
- Contacts
- Attorney
- Children
- Findings
- Categories
- Approval
- Copies

Each screen will have navigation tabs at the top of the screen. After a case has been entered, the user can use the tabs to navigate through the different screens.

The image shows a screenshot of a web application interface for entering case information. At the top, there is a horizontal navigation bar with ten tabs: Case, Courts, Review, Contacts, Attorney, Children, Findings, Categories, Approval, and Copies. The 'Case' tab is currently selected and highlighted in blue. Below this bar is a large form titled 'Add Cases'. Inside the form, there is a smaller version of the navigation bar, also with 'Case' selected. The form contains several input fields: 'District / Board\*' with a dropdown menu labeled 'Select District / Board'; 'County\*' with a dropdown menu labeled 'Select County'; 'JD Type' with a dropdown menu labeled 'JD Number'; 'JD Number\*' with a text input field containing '9995 9995 00'; 'KK Number' with a text input field; 'Review of\*' with a text input field; and 'Notes' with a large text area. At the top right of the form, there are 'Close' and 'Submit' buttons. At the bottom right, there is a 'Next' button. The footer of the form indicates 'Copyright ©2024 State of Oklahoma'.

## Things to Remember When Entering a Case or Review

- All data fields marked with a red asterisk (\*) are required and must be completed before moving on to the next page.
- To get to the next screen click the **Next** button at the bottom right of the screen.
- Once data has been entered on a screen the tabs at the top of the screen can be used to move more easily from screen to screen.
- For a review to be saved, the **Submit** button at the top right of the screen must be clicked.



To save time, users may enter all required information for a case initially, save the case, and then add/edit the details at a later time.

# The Case Screen

The **Case** screen captures all basic information about the case. All case information will be saved, and when additional reviews are added to a case, the user will not have to reenter information on this screen.

## Things to Remember on the Case Screen

- All fields marked with a red asterisk (\*) are required fields.
- Even fields that are not required should be completed if the information is available.
- After all information has been entered, click **Next** at the bottom right to move to the next screen.
- Most cases will require a JD#, but in some rare instances involving delinquent youth, the user will enter a JDL#. There is a dropdown under JD Type to choose between these two.

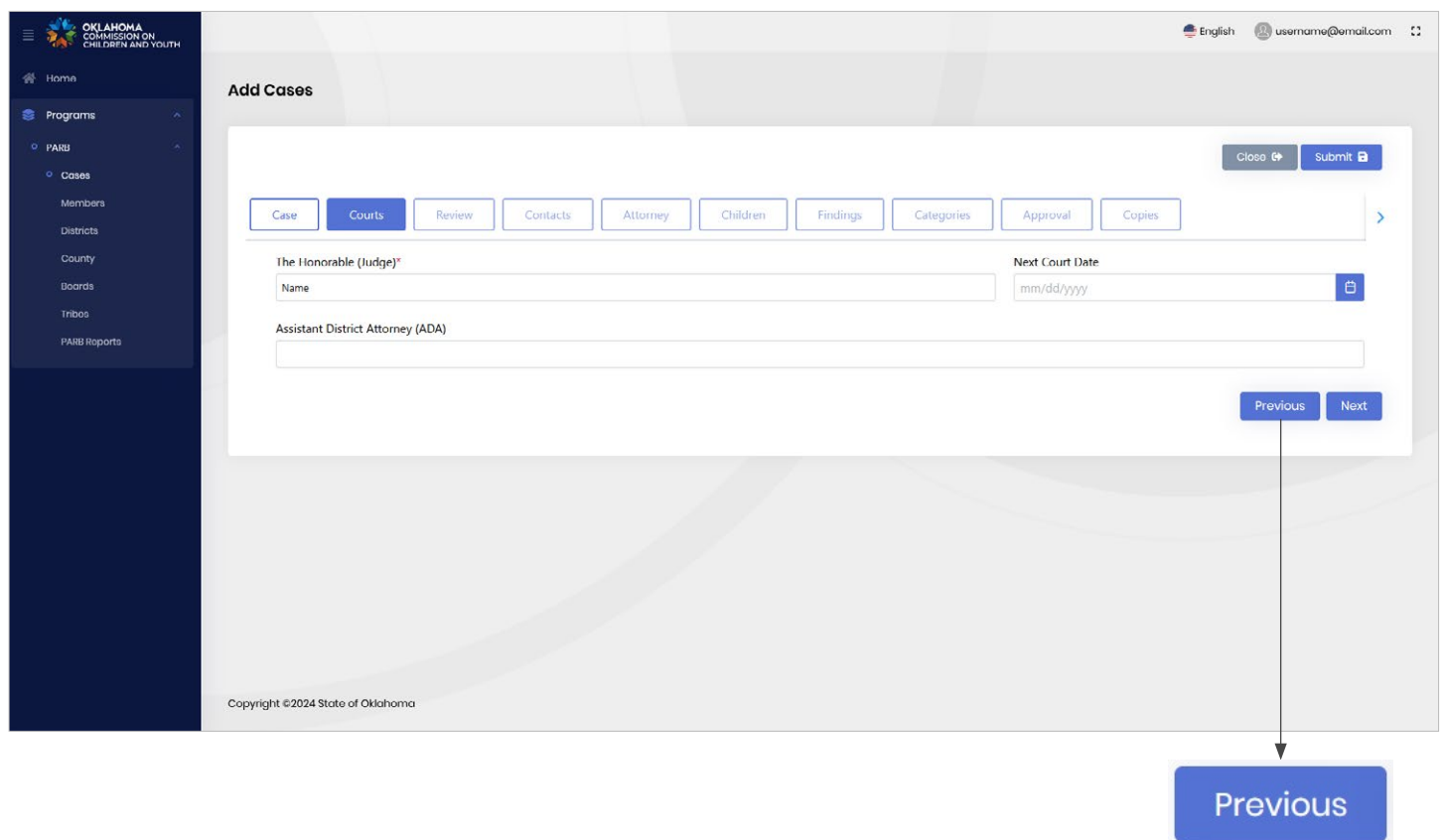
The screenshot displays the 'Add Cases' interface. On the left is a dark blue sidebar with the Oklahoma Commission on Children and Youth logo and a menu including Home, Programs, PARR, Cases, Members, Districts, County, Boards, Tribes, and PARR Reports. The main content area is titled 'Add Cases' and features a 'Close' button and a 'Submit' button at the top right. Below these are tabs for Case, Courts, Review, Contacts, Attorney, Children, Findings, Categories, Approval, and Copies. The 'Case' tab is active. The form includes: 'District / Board\*' (dropdown), 'County\*' (dropdown), 'JD Type' (dropdown), 'JD Number\*' (input with a mask 9995 9995 00), 'KK Number' (input), 'Review of\*' (input), and 'Notes' (text area). A 'Next' button is at the bottom right of the form, with an arrow pointing to a larger 'Next' button below it. A hand cursor is shown clicking the larger 'Next' button. The footer shows 'Copyright ©2024 State of Oklahoma'.

# The Courts Screen

The **Courts** screen captures information about the court including the judge’s name, the next court date, and the ADA’s name.

## Things to Remember on the Courts Screen

- The **Next Court Date** field is useful when managing upcoming cases. It should be entered if possible.
- Since the **Courts** screen is the 2nd screen when setting up a new case, the user can begin using the previous button to move to the previous screen.



## Pro Tip #2

The Calendar feature is consistent throughout the PARB database. Below are tips for using the calendar feature to choose dates.

To use the date picker feature, click on the blue **Calendar Icon** next to a date field.

- Click the dropdown for the year and choose the year.
- Next, use the dropdown to pick the month.
- Finally, pick a date by clicking on the correct day of the month.
- The date may also be entered manually in the date field.

The screenshot displays the 'Add Cases' form in the OCCY PARB database. The form includes fields for 'The Honorable (Judge)\*' (Name), 'Assistant District Attorney (ADA)', and 'Next Court Date'. The 'Next Court Date' field is highlighted with a red circle '1' and a hand icon, indicating where to click the calendar icon. A date picker overlay is shown, with a red circle '2' highlighting the month and year dropdowns (May 2024) and a red circle '3' highlighting the date selection (23). The date picker shows a calendar grid for May 2024, with the date 23 selected. The form also includes tabs for Case, Courts, Review, Contacts, Attorney, Children, Findings, Categories, Approval, and Copies. The 'Courts' tab is currently selected. The sidebar on the left shows the navigation menu with options like Home, Programs, PARB, Cases, Members, Districts, County, Boards, Tribes, and PARB Reports. The footer indicates 'Copyright ©2024'.

# The Review Screen

The **Review** screen captures the review date, the next review date, and the reviewer's name. A single case may have multiple reviews.

## Things to Remember on the Review Screen

- The **Next Review Date** field is not required but should be entered or estimated as it helps when managing upcoming cases.
- When selecting the reviewer, the user will click the arrow on the **Reviewer** field to access a dropdown of PARB members.

The screenshot displays the 'Add Cases' form in the OCCY PARB Database. The form is titled 'Add Cases' and features a sidebar with navigation links: Home, Programs, PARB, Cases, Members, Districts, County, Boards, Tribes, and PARB Reports. The 'Review' tab is selected, showing fields for 'Review Date' (05/23/2024), 'Next Review Date' (mm/dd/yyyy), and 'Reviewer' (Select a reviewer). A callout box highlights the 'Reviewer' field, showing a dropdown menu with a hand cursor pointing to the arrow icon.

Reviewer\*

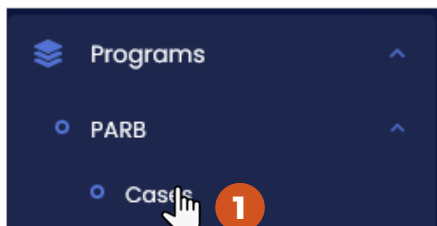
Select a reviewer

# The Contacts Screen

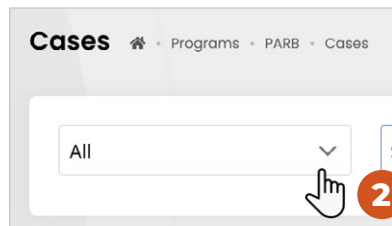
The **Contacts** screen captures contact information on the DHS worker, the DHS supervisor, and foster parents. An option to enter a contact date is also available. Although this information is not required, it may be helpful for those PARB Boards who want to document contact information and dates for each case.

**!** Check the information in the contacts for each review to make sure that it is accurate and update if needed.

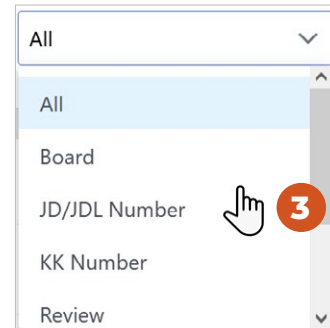
**!** To search for an existing case, use the search function at the top of the screen and search by JD/JDL#, KK Number or Review Name. See page 22 for detailed instructions on locating an existing case.



1. Navigate to the main Cases page.



2. Find the dropdown next to the search bar and click to view search filtering options.



3. Click on an option in the dropdown, and then enter text into the search box to filter cases.

# The Attorney Screen

The **Attorney** screen captures contact information on attorneys involved in the case, tribal information, and CASA worker information.

## Things to Remember on the Attorney Screen

- There is more than one field for Dad’s attorney so that if more than one father is involved, that information can be documented.
- Tribal information may be entered here. This information is per review, not per child.
- Check attorney information during each review to ensure that the information is accurate or needs to be updated.

The screenshot shows the 'Add Cases' form with the 'Attorney' tab selected. The form includes fields for Mom's Attorney, Dad's Attorney-1, Dad's Attorney-2, Other Attorney, CASA, Tribe (a dropdown menu labeled 'Select Tribe'), and Tribal Worker. Navigation buttons for Case, Courts, Review, Contacts, Attorney, Children, Findings, Categories, Approval, and Copies are at the top. 'Close' and 'Submit' buttons are in the top right. 'Previous' and 'Next' buttons are at the bottom right. The footer shows 'Copyright ©2024 State of Oklahoma'.

# The Children Screen

The **Children** screen captures information on all children involved in the case including name, gender, date of birth, child's attorney, current placement, date of removal, ICWA status, case status, closing date, and closing reason.

## Things to Remember on the Children Screen

- The date of removal can be the date of the emergency hearing and can usually be found on the ISP. It is okay to estimate the date of removal based on the information available.
- Enter a valid DOB (05/07/2019).
- Although not all fields are required on this screen, it is best to enter all fields possible.
- Child information will carry over to subsequent reviews, so if any information changes, the user will need to update the data fields.
- Use the **Add Child** button to add as many additional children as needed.

The screenshot shows the 'Add Cases' interface. On the left is a sidebar with navigation links: Home, Programs, PARB, Cases, Members, Districts, County, Boards, Tribes, and PARB Reports. The main content area is titled 'Add Cases' and features a horizontal tab bar with options: Case, Courts, Review, Contacts, Attorney, Children (selected), Findings, Categories, Approval, and Copies. Below the tabs, there's a 'Child 1' label and a '+ Add Child' button. The form fields are organized into two columns. The left column contains: Name\*, Date Of Birth\* (with a calendar icon), Date of removal (with a calendar icon), Closing Date (with a calendar icon), and Notes, if any. The right column contains: Gender (dropdown menu), Child's Attorney, Indian Child Welfare Act (checkbox), Placement Type (dropdown menu), Case Status (checkbox), and Closing Reason (dropdown menu). At the top right of the form area are 'Close' and 'Submit' buttons. At the bottom right of the form area are 'Previous' and 'Next' buttons. An arrow points from the '+ Add Child' button in the top right of the form area to a larger '+ Add Child' button at the bottom right, which is being clicked by a hand icon.

# The Findings & Recommendations Screen

The **Findings and Recommendations** screen captures the most current information about the case and what PARB recommends for each review. The most important and required data field on this screen is the recommendations box. This is where members will enter all recommendations for a review, so it is essential for users to be as detailed as possible when entering this information.

## Things to Remember on the Findings & Recommendations Screen

- Entering detailed findings helps document the history of the case.
- The more detailed the recommendation, the more guidance and PARB support courts will have to make decisions.
- If possible, complete the fields under the recommendation text box; this will help PARB track important information.

The screenshot shows the 'Add Cases' interface for the Oklahoma Commission on Children and Youth (OCCY) PARB Database. The left sidebar contains a navigation menu with options: Home, Programs, PARB, Cases, Members, Districts, County, Boards, Tribes, and PARB Reports. The main content area is titled 'Add Cases' and features a tabbed interface with tabs for Case, Courts, Review, Contacts, Attorney, Children, Findings (selected), Categories, Approval, and Copies. The 'Findings' tab is active, displaying two large text input areas: 'Board Findings' and 'Board Recommendations\*'. Below these are four dropdown menus: 'Recommendations for permanency' (with the text 'Select Recommendations for permanency'), 'Siblings placed together' (with the text 'Select Siblings placed together'), 'Previous deprived adjudications within last three years' (with the text 'Select Previous deprived adjudications within last three years'), and 'Do you think children are safe in current placement' (with the text 'Select Do you think children are safe in current placement'). At the bottom right, there are 'Previous' and 'Next' buttons. The top right of the interface shows a language selector set to 'English' and a user profile icon with the email 'username@email.com'.

# The Categories Screen

The **Categories** screen lists 16 categories that may apply to the case. This is where PARB members will consider what was recommended and which categories align or fit within the recommendation. Definitions for all categories can be found in the Appendix.

## Things to Remember on the Category Screen

- Select all categories that apply to the recommendation. For example, if a recommendation suggests that parents complete their service plan and that the child see a therapist once a week, then the following categories should be checked: **ISP** (for parents) and **Mental Health Services**.
- The category screen provides information that can be tracked to help OCCY and PARB leadership better understand what kinds of recommendations are being presented to the courts.
- This information should be completed for every review.

The screenshot displays the 'Add Cases' interface. On the left is a dark blue sidebar with the Oklahoma Commission on Children and Youth logo and a menu including Home, Programs, PARB, Cases, Members, Districts, County, Boards, Tribes, and PARB Reports. The main content area has a light gray header with 'Add Cases' and user information (English, username@email.com). Below the header is a row of tabs: Case, Courts, Review, Contacts, Attorney, Children, Findings, Categories (highlighted in blue), Approval, and Copies. A 'Close' button with a back arrow and a 'Submit' button with a lock icon are in the top right. Under the 'Categories' tab, there is a 'Clear all selections' button and two columns of checkboxes. The first column includes: Placement, Parental Rights and Supports, Visitation-Parental, Tribal Supports, Healthcare Services, Individual Service Plan (ISP) for children, ICWA Findings, and Reasonable Efforts. The second column includes: Mental Health Services, Visitation-Sibling, Community Resources, Educational Supports, Individual Service Plan (ISP) for parents, Assignment of Worker/Advocate, Active Efforts, and Permanency Plan. At the bottom right of the form area are 'Previous' and 'Next' buttons.

## The Approval Screen

The **Approval** screen will mainly be used by the PARB chairperson for each site. This is where the chairperson will enter their name, showing that they have approved the review. The Judicial Acknowledgment box should be left blank, so that the judge can sign the paper form when printed.

The screenshot shows the 'Approval' screen within the 'Add Cases' section. The left sidebar contains the 'Oklahoma Commission on Children and Youth' logo and a navigation menu with 'Home', 'Programs', 'PARB', 'Cases', 'Members', 'Districts', 'County', 'Boards', 'Tribes', and 'PARB Reports'. The main content area has a 'Close' button and a 'Submit' button at the top right. Below these are tabs for 'Case', 'Courts', 'Review', 'Contacts', 'Attorney', 'Children', 'Findings', 'Categories', 'Approval' (selected), and 'Copies'. The 'Approval' tab contains two text input fields: 'PARB Chairperson' and 'Judicial Acknowledgement'. At the bottom right are 'Previous' and 'Next' buttons.

## The Copies Screen

The **Copies** screen is another screen that will mainly be used by the chairperson to manage the review and check how many copies are to be distributed and to whom.

The screenshot shows the 'Copies' screen within the 'Add Cases' section. The left sidebar is identical to the previous screen. The main content area has a 'Close' button and a 'Submit' button at the top right. Below these are tabs for 'Case', 'Courts', 'Review', 'Contacts', 'Attorney', 'Children', 'Findings', 'Categories', 'Approval', and 'Copies' (selected). The 'Copies' tab contains a 'Clear all selections' button and two columns of checkboxes. The first column includes 'Child's Attorney', 'OKDHS', 'Tribe', and 'Placement'. The second column includes 'Parent's Attorneys', 'District Attorney', 'CASA', and 'OJA'. At the bottom right are 'Previous' and 'Submit' buttons.

# Submitting the First Review in a Case

After all information has been entered into all screens, the user will click **Submit** at the bottom right of the screen or at the top right of the screen. For the first review, this will also create the case.

## Things to Remember About Submitting the First Review

- All required fields must be entered before the user can submit a review.
- Once a review is submitted, the user may edit the review if information needs to be corrected or added (see page 22 for instructions on editing a case).

The screenshot shows the 'Add Cases' form in the OCCY system. The form is titled 'Add Cases' and has a 'Close' button and a 'Submit' button at the top right. Below the title is a horizontal row of tabs: Case, Courts, Review, Contacts, Attorney, Children, Findings, Categories, Approval, and Copies. The 'Review' tab is selected. Below the tabs is a 'Clear all selections' button. There are two columns of checkboxes: 'Child's Attorney', 'OKDHS', 'Tribe', 'Placement', 'Parent's Attorneys', 'District Attorney', 'CASA', and 'OJA'. At the bottom right of the form are 'Previous' and 'Submit' buttons. An arrow points from the 'Submit' button in the form to a larger 'Submit' button below it, which has a hand cursor icon over it.

# Printing a Review

After a review has been submitted into the data system, the user may print copies of the review to distribute to the court and other parties.

To print the review, the user will:

- Open the desired review.
- Click the Print button on the bottom left corner of the screen.

**Case Detail**

1 Case 2 Court 3 Review 4 Contacts 5 Attorneys 6 Child(ren) 7 Findings 8 Categories 9 Approval 10 Copies

**CASE DATE** 04/09/2024 **OPEN**

Created By: Kaitlyn Everett Created On: 04/09/2024

**CASE DETAILS**

District / Board:  County:

JD Type:  JD#:  KK#:

Review Of:

Notes:

**Print** **Delete** **Edit Review** **Lock** **Next**



**POST ADJUDICATION REVIEW BOARD FINDINGS AND RECOMMENDATIONS**

The form includes fields for Case Date, Review of, District / Board, County, JD Type, JD#, KK#, Review Of, and Notes. It also includes sections for 'BOARD'S FINDINGS' and 'BOARD'S RECOMMENDATIONS'. The form is labeled 'PAGE 1 OF 1' and 'Printed: 5/23/2024'.

The printed review will summarize the case and review.

# Locking a Review

After a review has been submitted to the court, it may be locked so that additional edits may not be made. To lock a review the user will:

- Locate the desired review.
- Click the **Lock** button located on right side of the screen.

The screenshot shows the 'Case Detail' form for the Oklahoma Commission on Children and Youth. The form has a sidebar with navigation links like Home, Programs, PARS, Cases, Members, Districts, County, Boards, Tribes, and PARS Reports. The main content area shows the 'Case' tab selected, with a progress bar at the top. The 'Case' tab contains fields for Case Date (04/09/2024), Created By (Kaitlyn Everett), and Created On (04/09/2024). Below this is the 'CASE DETAILS' section with fields for District / Board (Test Board), County (Cleveland), JD Type (JD Number), JD# (1234), KK# (0001), Review Of (Wilson Kids), and a Notes field. At the bottom right of the form, there are buttons for Print, Delete, Edit Review, and Lock. An arrow points from the Lock button to a larger Lock button below.



Only PARB Chairs may lock/unlock cases.

## Searching for a Case/Review

After a case and initial review are created, the user can locate that case by using the search bar on the cases page. Cases can be searched by:

- Board
- JD/JDL #
- KK #
- Review Name
- Judge Name
- PARB Member

Users will choose the best search method for them from a dropdown on the cases page.

OKLAHOMA COMMISSION ON CHILDREN AND YOUTH

English Username@iemail.com

Cases

test

Advanced Search

| Review Of      | Last Review | Next Review Date | All Reviews | Add Review | Actions        |
|----------------|-------------|------------------|-------------|------------|----------------|
| Arias Family   | 04/11/2024  | 10/09/2024       | (2) reviews | Add        | Print Download |
| Johnson Family | 04/09/2024  | 10/09/2024       | (1) review  | Add        | Print Download |
| Wilson Kids    | 04/09/2024  | 09/11/2024       | (1) review  | Add        | Print Download |

Showing 1 to 3 of 3 entries

All

All

Board

JD/JDL Number

KK Number

Review

# Editing a Case/Review

There may be instances when a PARB member may need to edit an existing case or review. This may happen if they have left fields blank and need to update the case or review with new information. Users may also edit a case when they discover data entry errors that need to be corrected. To edit a case or review:

- Locate the case or review that needs editing.
- Choose the review to be edited. If the last review needs to be edited, the user may click on the review under the **Last Review** column. If the review needing to be edited is not the latest review, the user will click on the dropdown under the **All Reviews** column and choose the correct review to edit.
- After clicking on the desired review, the user will click the **Edit Review** button located at the bottom right.
- After desired edits have been made, the user will click the update button at the top-right hand corner of the page.

The screenshot displays the OCCY Cases page. The left sidebar shows the navigation menu with 'Programs' expanded, including 'PARB', 'Cases', 'Members', 'Districts', 'County', 'Boards', 'Tribes', and 'PARB Reports'. The main content area shows a table of cases with columns: #, Board, JD/JDL/KK, Review Of, Last Review, Next Review Date, All Reviews, Add Review, and Actions. The table lists three cases: 1. Test Board, ID# 7821-0006, Arias Family, Last Review 04/11/2024, Next Review Date 10/09/2024; 2. Test Board, ID# 7821-0003, Johnson Family, Last Review 04/09/2024, Next Review Date 10/09/2024; 3. Test Board, ID# 1234 0001, Wilson Kids, Last Review 04/09/2024, Next Review Date 09/11/2024. The 'All Reviews' column for the first case is expanded, showing a dropdown menu with options: '(2) reviews', '04/11/2024', '04/15/2024', and '(1) review'. A hand cursor is pointing at the '04/11/2024' option. Below the table, a detailed view of the 'All Reviews' dropdown is shown, listing the same options. The page footer indicates 'Copyright ©2024 State of Oklahoma'.

| # | Board      | JD/JDL/KK     | Review Of      | Last Review | Next Review Date | All Reviews              | Add Review | Actions |
|---|------------|---------------|----------------|-------------|------------------|--------------------------|------------|---------|
| 1 | Test Board | ID# 7821-0006 | Arias Family   | 04/11/2024  | 10/09/2024       | (2) reviews              | Add        | Print   |
| 2 | Test Board | ID# 7821-0003 | Johnson Family | 04/09/2024  | 10/09/2024       | 04/11/2024<br>04/15/2024 | Add        | Print   |
| 3 | Test Board | ID# 1234 0001 | Wilson Kids    | 04/09/2024  | 09/11/2024       | (1) review               | Add        | Print   |

Showing 1 to 3 of 3 entries

**All Reviews**

- (2) reviews
- 04/11/2024
- 04/15/2024
- (1) review

**Case Detail**

Case | Court | Review | Contacts | Attorneys | Child(ren) | Findings | Categories | Approval | Copies

**CASE DATE** 04/09/2024 **OPEN**

Created By: Kaitlyn Everett Created On: 04/09/2024

**CASE DETAILS**

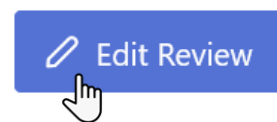
District / Board: Test Board County: Cleveland

JD Type: JD Number: 1234 JD#: 0001 KK#:

Review Of: Wilson Kids

Notes:

**Print** **Delete** **Edit Review** **Lock** **Next**



**Update Review**

**CASE DATE** 04/11/2024 **Close** **Update**

Created by: Kaitlyn Everett Created On: 04/11/2024

**Case** | Courts | Review | Contacts | Attorney | Children | Findings | Categories | Approval | Copies

District / Board\*: Test Board County\*: Okluskee

JD Type: JD Number: 2021 JD Number\*: 0006 54 KK Number:

Review of\*: Arias Family

Notes:

**Next**



Again, if the review needing to be edited is not the latest review, the user will click on the dropdown under the All Reviews column and choose the correct review to edit.

## Adding a Child to a Case

There may be instances when one or more children will need to be added to an existing case after the case has already been created and an initial review has been entered. Adding a child to a case should be done at the time of the current review, since each review documents the children only on that review. To add a child to a case the PARB member will:

- Click **Add** or **Edit Review**, depending on if you are adding a new review or editing an existing review.
- Continue through the screens as normal.
- Add the child to the review by clicking the **Add Child** button on the **Children** Screen.
- A new navigation tab and form will appear for each child added.
- Complete the information for the additional child.

Any children added to a case after the initial review will continue to show up on the **Children** screen in subsequent reviews unless the child's case has been closed in a previous review.

The screenshot displays the 'Add Cases' interface of the Oklahoma Commission on Children and Youth (OCCY) system. The sidebar on the left contains navigation links: Home, Programs, PARB, Cases, Members, Districts, County, Boards, Tribes, and PARB Reports. The main content area is titled 'Add Cases' and features a series of tabs: Case, Courts, Review, Contacts, Attorney, Children, Findings, Categories, Approval, and Copies. The 'Children' tab is currently selected, showing a sub-tab bar with 'Child 1', 'Child 2', and 'Child 3'. Below this, there is a form for adding a child. The form includes fields for Name\*, Date Of Birth\* (with a calendar icon), Date of removal (with a calendar icon), Closing Date (with a calendar icon), Gender (dropdown menu), Child's Attorney, Indian Child Welfare Act (checkbox), Placement type (dropdown menu), Case Status (checkbox), and Closing Reason (dropdown menu). A blue button labeled '+ Add Child' and a red button labeled 'X Remove Child' are located at the top right of the form. An arrow points from the '+ Add Child' button to a larger, highlighted version of the same button below the form, which has a hand cursor icon over it.

# Closing a Child out of a Case

There may be instances in which a child is no longer part of a case. Children may be closed out of a case during the current review. To close a child out of a case while leaving the case open, the user will:

- Locate the case and add the review as normal.
- On the **Children** screen, click on the child to be closed.
- Click **Closed** under **Case Status**.
- Enter a **Closing Date** and a **Closing Reason** from the dropdown.

Created by: Kaitlyn Everett Created On: 04/11/2024

Case Courts Review Contacts Attorney **Children** Findings Categories Approval Copies

Child 1 Child 2

+ Add Child - Remove Child

Name\* Stella Anas Gender Female

Date Of Birth\* 04/01/2012 Child's Attorney

Date of removal mm/dd/yyyy Months Out Of Home 0 Placement Type Kinship

Indian Child Welfare Act ☒ Is ICWA?

Case Status ☒ Closed? Closing Date 05/23/2024 Closing Reason Other

Notes, if any

Other  
Adoption  
Aging Out  
Placed In Guardianship  
Returning Home

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Case Status ☒ Closed? Notes, if any

Closing Date 05/23/2024

Closing Reason Other

Other  
Adoption  
Aging Out  
Placed In Guardianship  
Returning Home

# Closing a Case

If it is time to close the case, the user will:

- First, close out all of the children in the case.
- Save the case after closing all of the children out, so that all information is saved.
- From the main cases page, locate the **Action** column, and hover mouse over the **Lock Symbol**.
- Click the lock symbol to close the case.
- Enter a Closing Date, a Closing Reason, and any additional information needed in the text box.
- Click **Close Case** at the lower right.

The screenshot displays the OCCY Cases page. A table lists three cases with columns for #, Board, JD/JDL/KK, Review Of, Last Review, Next Review Date, All Reviews, Add Review, and Actions. The Actions column contains a lock icon. A red circle with the number 1 points to this icon. An arrow points from the lock icon to a 'Case Closing Reason' modal form. The modal form has fields for Closing Date (05/23/2024), Closing Reason (Select closing reason), and Closing Reason Other. A red circle with the number 2 points to the Closing Reason field, and a red circle with the number 3 points to the Closing Reason dropdown menu. At the bottom right of the modal, there are 'Cancel' and 'Close Case' buttons. A red circle with the number 4 points to the 'Close Case' button.

| # | Board      | JD/JDL/KK     | Review Of      | Last Review | Next Review Date | All Reviews | Add Review | Actions |
|---|------------|---------------|----------------|-------------|------------------|-------------|------------|---------|
| 1 | Test Board | JD# 2021-0006 | Arias Family   | 04/11/2024  | 10/09/2024       | (1) review  | Add        | Lock    |
| 2 | Test Board | JD# 2021-0003 | Johnson Family | 04/09/2024  | 10/09/2024       | (1) review  | Add        | Lock    |
| 3 | Test Board | JD# 1234-0001 | Wilson Kids    | 04/09/2024  | 09/11/2024       | (1) review  | Add        | Lock    |

Showing 1 to 3 of 3 entries

### Case Closing Reason

Closing Date: 05/23/2024

Closing Reason: Select closing reason

Closing Reason Other:

Cancel Close Case

## Pro Tip #3

Users can manage upcoming cases by using the **Next Review Date** column from the cases page.

1. Click on the sorting arrows to sort next review dates from newest to oldest, which will list the next reviews coming up by most recent date.
2. The user may have to click through any pages that have blank review dates, as those will be listed first when sorting reviews from newest to oldest.

The screenshot shows the OCCY PARB Database interface. The left sidebar contains navigation links: Home, Programs, PARB, Cases, Members, Districts, County, Boards, Tribes, and PARB Reports. The main content area is titled 'Cases' and includes a search bar with 'test' and a filter dropdown set to 'All'. Below the search bar is a table with the following columns: #, Board, JD/JDL/KK, Review Of, Last Review, Next Review Date, All Reviews, Add Review, and Actions. The table contains three entries:

| # | Board      | JD/JDL/KK     | Review Of      | Last Review | Next Review Date | All Reviews | Add Review | Actions        |
|---|------------|---------------|----------------|-------------|------------------|-------------|------------|----------------|
| 1 | Test Board | JD# 2021-0006 | Arias Family   | 04/11/2024  | 10/09/2024       | (1) review  | Add        | Print Download |
| 2 | Test Board | JD# 2021-0003 | Johnson Family | 04/09/2024  | 10/09/2024       | (1) review  | Add        | Print Download |
| 3 | Test Board | JD# 1234-0001 | Wilson Kids    | 04/09/2024  | 09/11/2024       | (1) review  | Add        | Print Download |

Below the table, it says 'Showing 1 to 3 of 3 entries'. A callout box below the table shows the 'Next Review Date' column with a sorting arrow icon and the following dates: 10/09/2024, 10/09/2024, and 09/11/2024.

# Viewing Reviews

There may be times when a user wants to look at review details, but does not want to add or edit a review. To view an individual review:

- Locate the review (see page 19).
- Click on the review.
- Navigate through the pages by clicking on the numbered screens at the top of the page or by using the Next button.
- Each number represents a different screen.

Case Detail

1 2 3 4 5 6 7 8 9 10

Case Court Review Contacts Attorneys Child(ren) Findings Categories Approval Copies

**CASE DATE** 04/09/2024 **OPEN**

Created By: Kaitlyn Everett Created On: 04/09/2024

**CASE DETAILS**

District / board: Test Board County: Cleveland

JD Type: JD Number JD# 1234 0001 ICP#

Review Of: Wilson Kids

Notes:

**Print** **Delete** **Edit Review** **Lock**

**Next**

1 2 3 4 5 6 7 8 9 10

Case Court Review Contacts Attorneys Child(ren) Findings Categories Approval Copies

## Getting Help

If you encounter issues, that even after trouble shooting, you need help resolving, you can:

- Contact Lisa White: [lisawhite@ou.edu](mailto:lisawhite@ou.edu)
- Contact Keith Pirtle: [keith.pirtle@occy.ok.gov](mailto:keith.pirtle@occy.ok.gov)
- Contact Shelbi Tatarian: [shelbi.tatarian@occy.ok.gov](mailto:shelbi.tatarian@occy.ok.gov)

**Reach out to us, and we will help resolve any issues you may be having!**

# Appendix: Definitions of Recommendation Categories

## Placement

The **placement category** should be chosen if anything regarding placement is mentioned in the recommendation. This can be a direct mention of placement, like placing all siblings together, or less direct, like trial reunification, which is a placement recommendation but does not mention the term placement. Examples include:

- Placing all siblings together
- Reunification
- Trial reunification
- Pursuing adoptive placement
- Reunification
- Trial reunification
- Pursuing adoptive placement
- Continuing with current placement
- Locating ICWA compliant placement
- Continuing with current placement

## Parental Rights and Supports

The **parental rights and supports** category should be chosen if the PARB recommends anything regarding parental rights or parental supports. This includes recommendations in favor of advocating for parental rights and supports, as well as recommendations in favor of terminating parental rights and supports. Examples include:

- Termination of parental rights
- Delaying termination of parental rights
- Enforcing/collecting child support payments
- Issuing a protective order

## Community Resources

The **community resources** category should be chosen if the PARB recommendation provides guidance about needed resources that can be obtained from a community organization. Examples include:

- Clothing resources
- Housing resources
- Mentoring services
- Financial resources

## Educational Supports

The **educational supports** category should be chosen if the PARB recommends anything regarding educational supports such as an IEP, specific educational training for youth or parents, or even extracurricular activities. Examples include:

- Tutoring
- Individual Education Plan (IEP)/504 Plan
- Career planning/training
- Specialized program (i.e., parenting class, adult transition planning, OSKA)
- Extracurricular activities

## Individual Service Plan (ISP) for Parents

The **ISP for parents** category should be chosen if the PARB recommends things pertaining to the parents' ISP plan, including an update on progress or engagement by the parents on their plan. Examples include:

- Documentation of parents' progress on ISP
- Proof of engagement in ISP
- Completion of ISP within a specified timeframe

## Individual Service Plan (ISP) for Children

The **ISP for children** category is like the ISP for parents and should be chosen if the PARB recommends something regarding a child's ISP. Examples include:

- Documentation of child's progress on ISP
- Proof of engagement in ISP
- Completion of ISP within a specified timeframe

## Assignment of Worker/Advocate

The assignment of the **worker/advocate** category should be chosen if the PARB recommends anything pertaining to the assignment of a worker or advocate. Although CASA workers and Guardian ad Litem are some of the most common workers/advocates that may show up in this category, it can be any type of formal advocate. Examples include:

- CASA worker
- Guardian ad Litem (GAL)
- Educational Guardian ad Litem (Ed GAL)

## Reasonable Efforts

The assignment of **reasonable efforts** should be chosen if the PARB volunteer's recommendation notes either the presence or lack of reasonable efforts by the permanency worker to facilitate the court-ordered permanency plan. Reasonable efforts must be evaluated and determined by the court every six months while the child remains in an out-of-home placement. Reasonable efforts consist of available, accessible, and causally related services targeted to help a family provide a safe and stable home. A good parameter of reasonable efforts is whether or not DHS is assisting the family in removing the specific barriers preventing the child/ren from achieving the permanency plan.

## Active Efforts

The assignment of **active efforts** should be chosen if the PARB volunteer's recommendation notes either the presence or lack of active efforts made by the state to provide remedial services and rehabilitative programs designed to prevent the breakup of the Indian family and that these efforts have proved unsuccessful. This finding must be made prior to a party seeking a foster care placement or termination of parental rights. Active efforts consist

of affirmative, active, timely, and culturally appropriate efforts to prevent the breakup of the Indian family. Active efforts are more than reasonable efforts.

## HealthCare Services

The assignment of the **healthcare services** category should be chosen if the PARB recommends any healthcare services other than mental health services, for which the PARB would choose the mental health services category. Healthcare services include:

- Medical checkups
- Specialized medical services
- Medical evaluations/assessments
- Dental services
- Vision screenings

## Mental Health Services

The assignment of the **mental health services** category should be chosen if the PARB recommends anything related to mental health services. This could be locating mental health services, or recommending a specific type of mental health service or facility or certain types of mental health assessments. Examples include:

- Counseling/therapy
- Psychological evaluation
- In-patient treatment
- Specialized program (Youth Villages, HOPE, Palamor)
- Trauma treatment/evaluation

## Sibling Visitation

The assignment of the **sibling visitation** category should be chosen if the PARB member recommends anything related to visitation between siblings. This could include scheduling a new visitation schedule so that siblings can spend time together. It could also include times in which a PARB member recommends that visits between siblings be stopped. Examples include:

- Sibling visitation
- Termination of sibling visitation

## Parental Visitation

The assignment of the **parental visitation** category should be chosen if the PARB recommends anything related to visitation between a parent and child. This could be scheduling or establishing a new visitation schedule. It could also include times in which the PARB recommends that visits between parents and children stop or need to be delayed. Examples include:

- Therapeutic visitation
- Supervised visitation
- Delaying visitation
- Overnight visitation
- Termination of visitation
- Delaying termination of visitation

## Tribal Supports

The assignment of the **tribal supports** category should be chosen if the PARB makes recommendations regarding tribal supports. This could be when PARB recommends that a child's enrollment into the tribe be verified or completed. It could also be chosen in instances where PARB recommends engagement in cultural activities. Examples include:

- Ensuring tribal enrollment
- Engagement in tribal activities

## ICWA Findings

**ICWA findings** are those that are specific to cases in which the court has determined that the Indian Child Welfare Act (ICWA) applies. ICWA-specific findings include:

1. Active efforts (see above)
2. Notice
  - a. Should be chosen if the PARB volunteer can determine that notice to the parent, custodian, or tribe has not been provided. In a deprived case, where the court knows or has reason to know that an Indian child is involved, the party seeking the foster care placement of, or termination of parental rights for an Indian child shall notify the parent or Indian custodian and the Indian child's tribe, by registered mail with return receipt requested, of the pending proceedings and

their right of intervention.

### 3. Good Cause

- a. Pursuant to federal and state ICWA statutes, the state and courts are obligated to follow ICWA placement preferences for both foster care and adoptive placements. If a child is in a non-ICWA home, the court must find good cause to deviate from each placement preference level for both foster care and adoptive placements. If the volunteer is unable to clearly ascertain the court's good cause findings from the legal records, the volunteer should consider addressing this finding.

## **Permanency Plan**

The assignment of the permanency plan category should be chosen if the PARB member makes recommendations regarding the permanency plan, including updating a permanency plan or establishing a plan. Examples include:

- Solidifying permanency plan
- Updating permanency plan
- Continuing with permanency plan
- Permanency planning with current foster family