

# ***The Family Advocates Role: The Mechanics of Accountability***

In providing the care necessary and charged to us through our funding it is necessary for each employee to understand both the qualitative aspects (feeding a hungry family, treatment of depression or substance abuse of a family member, job placement of a parent, etc.) of his/her job and the quantitative aspects (completing the FPA, documentation in Progress Notes, meeting deadlines, etc.) of the job. This module is strictly concerned with the quantitative aspects of a Family Advocates job as this relates to the Family Partnership Agreement/Case Management.

This training module is about the quantitative parts of the job, the measurable parts, of timing and responsibilities involved in a Family Advocate's duty to assist families. This part is critical to our Mission Statement, "... help their families become self-reliant." Also, involved in the structure of the following criteria for measurement is the fact that we are very time-limited in the services we provide. We have only nine or ten months with many of the families we serve and at most two years. But most important to the urgency of our services is that some of our families are suffering daily.

- I. **Timing and Deadlines:**
  - A. ***Family Partnership Agreements***, home visits, ***Score Sheets***, and ***Individualized Family Goal Sheets*** must be completed within 4 months of the child's entry date into our program. In order to have this done the Family Advocate must begin this process within the first month of the children enrolling in the Center.
  - B. The ***Individualized Family Goals Sheet*** will include Goal Reviews that are required at least every three months.
  - C. The Case Management Meeting and completion of the ***Case Management Summary*** must be done within a few days of the Family Partnership Agreement.
- II. **Documentation:**

- A. The entry date and also reentry date of the child must appear on **Enrollment Form** found under tab 3 in the child's folder.
- B. Contacts with parents for home visits, to schedule Case Management meeting, session for **Family Partnership Agreement** completing must be documented in **Daily Contact Notes** (tab 6). If a family member fails to show up for appointment, this must also be documented in **Daily Contact Notes**.
- C. **Progress Notes** must reflect actions or lack of actions take by parents as outline in the Steps on the **Individualized Family Goals Sheet**. If in the process of working with a family, new goals are established (which is very possible and likely), these are also to be documented in the **Progress notes** as well as a new **Individualized Family Goals Sheet** must be added (with signatures) immediately behind the original under tab 4 in the child's folder.
- D. Copies of **Referral Forms** must be place under tab 4 in the child's folder, immediately behind the **Progress Notes**, as well as a copy in the **Referral Notebook**. The date of writing the referral must be noted in the **Progress Notes**, and a follow-up on the referral is required within two weeks. This follow-up and result(s) must also be accounted for in the **Progress Notes** as well as on the **Referral Form**.

### III. **Structure and Accountability:**

- A. In section 4 of the folder the proper order of forms is:
  - 1. *Case Management Sheet (first)*
  - 2. *IFP Forms (second)*
  - 3. *Progress Notes (third)*
  - 4. *Referrals (fourth)*
- B. For families in their second year the current year's documents will precede the first years documents. Keep all the first year forms in their own sequence or order. First and second year documents are not to be mixed in section 4 of the folder.

- C. On the first working day of each month the Family Advocate will give to the Site Manager a projected work sheet that will state:
1. *Number of IFPs projected for the month*
  2. *Number of 3 month reviews for the month*
  3. *Number of 6 month reviews for the month*
  4. *Number of Case Management Meetings projected for the month*
  5. *Summary of enrollment efforts projected for the month*
  6. *Problems of concerns about services to families*
- D. Meet with the Site Manager each month to review quality of goals stated for the family, steps being taken and progress reported in review sessions with parents.
- E. Keep a desk calendar or some form of calendar of scheduled event to structure your follow-up sessions, such as, goal review sessions, referral follow-ups, etc.
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***Complete the following exercise.***

1. ***When we talk about the quantitative aspects of a job we are talking about the parts of the job that are***
  - a. dealing with parents.
  - b. the most enjoyable to do.
  - c. measurable.
  - d. always done by the team.
2. ***Formal review of goals with parents must be done at least***
  - a. by two different staff.
  - b. every other week.
  - c. during the home visit.
  - d. every three months.
3. ***Scheduling an appointment with a parent for a Case Management meeting of FPA session must be documented***
  - a. in the Progress Notes.
  - b. in the Daily Contact Notes.
  - c. on the Goal sheet.
  - d. on the center bulletin board.
4. ***If after the initial goal sheet is completed, a new goal is identified for the family, a new goal sheet***
  - a. must be added right behind the first one.
  - b. must be added under tab 6.

- c. is not necessary.
- d. must be approved by the Site Manager.

**5. *The Family Advocate is to give the Site Manager a "Projected Work Sheet"***

- a. when this is asked for by the Site Manager.
- b. if there have been problems meeting deadlines.
- c. at the "goal review" meeting.
- d. on the first working day of each month.

**6. *A meeting with the Site Manager to review goals, steps, and progress of families***

- a. must be set up within a month after the FPA is done.
- b. must be scheduled each month.
- c. is only necessary if there are problems with the family.
- d. is optional.

**7. *Referral forms are kept***

- a. anywhere in section 4.
  - b. in a locked cabinet.
  - c. only in the Referral Notebook.
  - d. in section 4 behind Progress Notes and in Referral Notebook.
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