



Practice Alert

Quarterly Summary for Case Management

The purpose of this Practice Alert is to give specific guidance to staff regarding the entry of the Quarterly Summary as a “Contact” entry in FACES for Family Centered Services and Alternative Care cases.

Beginning in 2019, a new alert will be generated in FACES, alerting the case manager that the quarterly summary for the previous quarter is due. Another alert will be sent to the supervisor on the 16th of the month if this has not been completed.

The quarters are defined as follows:

	Dates Covered	Date Summary Due	Date of Supervisor Alert
1 st Quarter	January 1 – March 31	April 1	April 16
2 nd Quarter	April 1 – June 30	July 1	July 16
3 rd Quarter	July 1 – September 30	October 1	October 16
4 th Quarter	October 1 – December 31	January 1	January 16

Note: If a case is opened at the end of a quarter, a summary is still due for that case. In this situation the summary will be brief (there is no need to repeat case opening reasons as this is recorded in the opening summary).

For a Contact entry to count in FACES as the quarterly summary, it must have the purpose of “Quarterly Summary” and be dated within the date range the summary covers. For example, a worker receives an alert on January 1 about the previous quarter (Oct-Dec). The worker writes a contact entry on that day. The contact must have a purpose of “Quarterly Summary” In this example; the date of the contact entry would be entered as December 31. The quarterly summary may be written up to one week prior to the quarter ending and if so, the date it is written is the date used in the contact.

The purpose of the quarterly summary is to provide a general update on the case. Case goal progress, status of the parents and children, and court information are examples of information to be written in the summary.

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