
**ORANGE COUNTY SOCIAL SERVICES AGENCY
CFS OPERATIONS MANUAL**

Effective Date: August 13, 2003
Revised: December 2, 2009

Number: I-0403

Health and Education Passport

Purpose	To provide guidelines for the collection, documentation, data entry, and distribution of health and education information regarding children in out-of-home care.
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Approved	This policy was approved by Mike Ryan, Director of CFS, on December 2, 2009. <i>Signature on file.</i>
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Background	This policy is a revision of Children and Family Services (CFS) Policy and Procedure (P&P) Health and Education Passport and incorporates pertinent information from CFS P&P Health and Education Information for Care Providers (K-0207-D), which is now rendered obsolete.
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When Juvenile Court proceedings are initiated on behalf of a child placed in protective custody, CFS is responsible for ensuring that the child's educational, medical, mental health, and dental needs are met. This requires that all relevant information about a child's educational, medical, mental health, and dental history must be collected, documented, entered into the Child Welfare Services/Case Management System (CWS/CMS), and provided to the child's out-of-home caregiver in a Health and Education Passport (HEP).

The HEP is a single document, generated from information entered into the CWS/CMS medical and educational notebooks, which includes all current educational, medical, mental health, and dental information regarding a child placed in out-of-home care.

The HEP is essential for ensuring that the out-of-home caregiver has all relevant, current information required to maintain continuity in providing for the child’s educational, medical, mental health, and dental needs.

Legal Mandates [Welfare and Institutions Code Section 16010\(a\) and \(c\)](#) outlines the specific health and education information that must be provided to a child’s out-of-home caregiver “as soon as possible, but not later than 30 days” after a child’s initial placement and within 48 hours of each subsequent placement. It provides the legal mandate for this information to be maintained in a HEP.

[Welfare and Institutions Code Section 16010\(e\)](#) requires a child’s out-of-home caregiver to obtain and maintain accurate and thorough educational, medical, and dental information regarding a child placed in out-of-home care.

[Welfare and Institutions Code Section 16010\(e\)](#) also specifies that the assigned Senior Social Worker (SSW) will ask the out-of-home caregiver for any new information required for inclusion in the HEP during each mandated contact and update the HEP as appropriate, but no later than the next Court date or within 48 hours of a placement change.

Definitions None.

POLICY

Collection **Emergency Response (ER)/Dependency Intake:**
The ER SSW and Dependency Intake SSW will obtain as much of the following information as possible regarding every child placed in protective custody:

- Names and addresses of the child’s health, dental, and educational providers
- Grade level performance
- School record
- Assurances that the child’s placement in foster care takes into account proximity to the school in which the child is enrolled at the time of placement
- A record of the child’s immunizations and allergies
- Known medical problems

- Current medications
- Past health problems and hospitalizations
- Record of relevant mental health history
- Known mental health condition and medications

Dependency Investigations/Continuing Services/Adoptions:

The assigned SSW will obtain this information on an ongoing basis throughout the period of time a child is placed in out-of-home care from the following sources:

- Monthly contacts with the child, out-of-home caregiver, medical providers, educational providers, service providers, and other collaterals pursuant to CFS P&P [Case Compliance and Documentation \(E-0105\)](#)
- Records provided by the child’s school and/or the County of Orange Department of Education
- The JV-225 pursuant to CFS P&P [Completion of the JV-225 \(I-0405\)](#)
- Orangewood Children’s Home (OCH) Medical Unit
- The child’s immunization card
- Reports provided upon submission of a completed Orange County Child Health and Disability Prevention Program (CHDP) medical examination pursuant to CFS P&P [Child Health and Disability Prevention Program \(I-0203\)](#)
- Completed *Medical/Dental Exam Reports (Encounter Form) (F063-28-336)*

Documentation

ER/Dependency Intake:

The ER SSW will document educational, medical, mental health, and dental information regarding a child placed in protective custody in a CWS/CMS referral contact and the Investigation Narrative pursuant to CFS P&Ps [Referral Compliance Contacts and Documentation \(A-0415\)](#) and [Abuse Investigations—Findings, Documentation, and Cross Reporting \(A-0305\)](#).

The Dependency Intake SSW will include any educational, medical, mental health, or dental information contained in the Investigation Narrative or obtained during the Dependency Intake investigation in the Detention Hearing Report (DHR) pursuant to CFS P&P [Dependency Intake \(A-0502\)](#).

Dependency Investigations/Continuing Services/Adoptions:

The assigned SSW will document educational, medical, and dental information collected during each contact with the child, the child’s out-of-home caregiver, medical providers, educational providers,

service providers, and other collaterals into a CWS/CMS case contact pursuant to CFS P&P [Case Compliance and Documentation \(E-0105\)](#).

Data Entry

Initial Data Entry:

The Court Services Public Health Nurse (PHN) and Dependency Investigations HEP Clerk will initiate the process of entering educational, medical, mental health, and dental information into CWS/CMS after a DHR has been filed on behalf of a child placed in protective custody pursuant to the Procedure outlined below.

Updated Data Entry:

The assigned SSW will use collected and documented educational, medical, mental health, and dental information to update the *HEP Facesheet (F063-28-323)* with specific, complete information and provide it to the HEP Clerk pursuant to the Procedure outlined below:

- Prior to transferring the case from Investigations to a continuing services program or Adoptions
- By the clerical date for each Status Review Hearing Court Report

Further, the Dependency Investigations SSW will immediately provide updated, relevant medical information (e.g., information regarding a surgery, diagnosis, or hospitalization) to the assigned PHN whenever such information is obtained during a Dependency Investigation. (**Note:** It is not required to update the HEP Facesheet to provide this information.)

The assigned HEP Clerk will enter educational information provided on the HEP Facesheet into CWS/CMS pursuant to the Procedure outlined below. (For instruction on how to enter educational information into CWS/CMS, refer to [CWS/CMS Data Entry Standards—Education Notebook and Individualized Education Plan \[IEP\] Instructions](#) and [CWS/CMS Data Entry Standards—Health and Education Passport](#).)

The assigned PHN/Dependency Investigations HEP Clerk will enter medical information provided on the HEP Facesheet into CWS/CMS pursuant to the Procedure outlined below. (For instruction on how to enter medical information into CWS/CMS, refer to [CWS/CMS Data Entry Standards—Health and Education Passport](#).)

The PHN will also forward recommendations for follow-up care to the assigned SSW via the *Foster Care PHN Recommendations (F063-28-339)* or email memo. The assigned SSW will review the *Foster Care PHN Recommendations (F063-28-339)* or email memo immediately upon receiving it and facilitate follow-up care as determined necessary in consultation with the Senior Social Services Supervisor (SSSS) and PHN. The assigned SSW will document information regarding the plan for follow-up care and/or completed follow-up care in a CWS/CMS case contact.

Distribution

Initial HEP:

The placing SSW will provide one copy of the initial HEP to the child's out-of-home caregiver upon the child's initial placement.

Updated HEP:

The assigned HEP Clerk will create the HEP and mail one copy of it to the child's out-of-home caregiver every six months when there have been no placement changes pursuant to the Procedure outlined below.

The placing SSW will provide a current HEP to the child's out-of-home caregiver upon every placement subsequent to the child's initial placement pursuant to CFS P&P [Out-of-Home Placement \(K-0208\)](#).

The Investigations SSW will file a copy of the current HEP in the service folder Medical Acco upon transferring a case to a continuing services program or Adoptions.

Note: It is best practice to provide the child's parent with an updated HEP upon a child returning to parental care from out-of-home placement.

Confidentiality

Information included in the HEP is protected health information, which will be used and/or disclosed pursuant to the guidelines outlined in the following CFS P&Ps:

- [Acquisition of Health Care Information \(I-0404\)](#)
- [Confidentiality—SSA Client Records \(F-0105\)](#)
- [HIV/AIDS Case Management \(D-0602\)](#)

Pursuant to CFS P&P [Care of Pregnant Children \(I-0207\)](#), a child's pregnancy status will not be included in the HEP.

Upon placing the child, the placing SSW will advise the child's out-of-home caregiver that information contained in the HEP is confidential and may only be shared with the child's health care, mental health care, and educational providers on an as-needed basis. Further, the placing SSW will advise the out-of-home caregiver of the responsibility to protect personal identifying information (PII), including dates of birth and Social Security numbers, to ensure that this information is only shared with those service providers who require it.

Child's Social Security Number:

The assigned program HEP Clerk, placing SSW, or assigned SSW will ensure that the child's Social Security number is not included on the HEP provided to the child's out-of-home caregiver by redacting/removing the Social Security number from the printed HEP.

REFERENCES

Attachments and Data Entry Standards

Click on the links below to directly access attachments to this P&P and any Data Entry Standards referred to.

- [CWS/CMS Data Entry Standards—Health and Education Passport](#)
 - [CWS/CMS Data Entry Standards—Education Notebook and Individualized Education Plan \(IEP\) Instructions](#)
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Hyperlinks

Users accessing this document by computer may create a direct connection to the following references by clicking on them.

- CFS P&P [Abuse Investigations-Findings, Documentation, and Cross Reporting \(A-0305\)](#)
- CFS P&P [Referral Compliance Contacts and Documentation \(A-0415\)](#)
- CFS P&P [Dependency Intake \(A-0502\)](#)
- CFS P&P [HIV/AIDS Case Management \(D-0602\)](#)
- CFS P&P [Case Compliance and Documentation \(E-0105\)](#)
- CFS P&P [Confidentiality—CFS Client Records \(F-0105\)](#)
- CFS P&P [Child Health and Disability Prevention Program \(I-0203\)](#)
- CFS P&P [Care of Pregnant Children \(I-0207\)](#)
- CFS P&P [Acquisition of Health Care Information \(I-0404\)](#)

- CFS P&P [Completion of the JV-225 \(I-0405\)](#)
- CFS P&P [Out-of-Home Placement \(K-0208\)](#)

Other Sources Other printed references include the following:
None.

REQUIRED FORMS

Online Forms Required forms listed below may be printed out and completed, or completed online, and may be accessed by clicking on the link provided.

Form Name	Form Number
HEP Cover Letter	F063-28-314
HEP Cover Letter (Spanish)	F063-28-314Sp
Periodic Medical/Dental Exam Report (HEP Encounter)	F063-28-336
Foster Care PHN Recommendations	F063-28-339

Hard Copy Forms Forms listed below must be completed in hard copy (including multi-copy NCR forms). ***For reference purposes only***, links are provided to view these hard copy forms, where available.

Form Name	Form Number
None.	

CWS/CMS Forms The following required forms may **only** be obtained in CWS/CMS. ***For reference purposes only***, links are provided to view these CWS/CMS forms, where available.

Form Name	Form Number
HEP Facesheet	F063-28-323
Health and Education Passport	OHCHEP REV

Brochures Brochures to distribute in conjunction with this procedure include:

Brochure Name	Brochure Number
None.	

PROCEDURE

Required Actions— Data Entry for Initial HEP	The following actions must be completed when entering educational, medical, and dental information after filing of a DHR on behalf of a child placed into protective custody.	
Staff Responsible	Step	Required Action
Court Services PHN	<ol style="list-style-type: none"> 1. 2. 3. 4. 5. 	<p>Review copy of DHR for all available medical information.</p> <p>Interview child’s parent(s) at Juvenile Court on date of Detention Hearing.</p> <p>Enter medical information into CWS/CMS.</p> <p>Document recommendations for the child’s follow-up care on <i>Foster Care PHN Recommendations (F063-28-339)</i> or email memo.</p> <p>Forward completed <i>Foster Care PHN Recommendations (F063-28-339)</i> or email memo to the:</p> <ul style="list-style-type: none"> • Assigned SSW • OCH Medical Unit if child housed at OCH • Investigations PHN for children 5 years 9 months of age and older • Early Childhood System of Care (ECSOC) PHN for children under 5 years 9 months of age
Education Specialist/ Assigned SSW	<ol style="list-style-type: none"> 6. 7. 8. 9. 	<p>Review DHR to determine child’s school of origin.</p> <p>Fax school or district office request for child’s educational records.</p> <p>Forward all educational records to Investigations IPT.</p> <p>Review educational records.</p>
HEP Clerk	<ol style="list-style-type: none"> 10. 	<p>Enter all available educational information into CWS/CMS.</p>

**Required Actions—
Data Entry for
Updated HEP**

The following actions must be completed when entering educational, medical, and dental information into CWS/CMS for a dependent child placed in out-of-home care pending a Status Review Hearing.

<u>Staff Responsible</u>	<u>Step</u>	<u>Required Action</u>
Court Typist	1.	Forward Court report reminder to HEP Clerk.
HEP Clerk	2.	Review court reminder list to identify children placed in out-of-home care with pending Status Review Hearing.
	3.	Create <i>HEP Facesheet (F063-28-323)</i> in CWS/CMS for identified children.
	4.	Email <i>HEP Facesheet (F063-28-323)</i> to assigned SSW.
Assigned SSW	5.	Complete each section of <i>HEP Facesheet (F063-28-323)</i> . OR Provide written instruction on <i>HEP Facesheet (F063-28-323)</i> referring HEP Clerk to most recent Court report. (Note: The Court Report <u>must</u> contain <u>all</u> required current information.)
	6.	Email or submit printed copy of completed <i>HEP Facesheet (F063-28-323)</i> to HEP Clerk by clerical date.
HEP Clerk	7.	Complete log entry documenting date completed <i>HEP Facesheet (F063-28-323)</i> received from assigned SSW.
	8.	Review <i>HEP Facesheet (F063-28-323)</i> for completion. If necessary, follow-up with assigned SSW to obtain missing information.
	9.	Enter educational information into CWS/CMS.
	10.	Forward <i>HEP Facesheet (F063-28-323)</i> to PHN.
PHN	11.	Review <i>HEP Facesheet (F063-28-323)</i> , Medical Acco, and current Status Review Report for all current medical information regarding child.

12. Enter medical information into CWS/CMS.
13. Document recommendations for the child's follow-up care on *Foster Care PHN Recommendations (F063-28-339)*.
14. Attach completed *Foster Care PHN Recommendations (F063-28-339)* to *HEP Facesheet (F063-28-323)*.
15. Return *HEP Facesheet (F063-28-323)* and *Foster Care PHN Recommendations (F063-28-339)* to HEP Clerk.

Required Actions— Distribution of Updated HEP Staff Responsible		The following actions must be completed when creating and issuing an updated HEP for a dependent child placed in out-of-home care pending a Status Review Hearing.	
Responsible	Step	Required Action	
HEP Clerk	1.	Delete existing HEP from CWS/CMS.	
	2.	Create new HEP in CWS/CMS and print HEP.	
	3.	Replace HEP cover sheet created in CWS/CMS with County of Orange <i>HEP Cover Letter (F063-28-314)</i> .	
	4.	Redact/remove child's social security number.	
	5.	Mail HEP, 6 <i>Medical/Dental Exam Reports (Encounter Forms) (F063-28-336)</i> , and six postage paid envelopes to child's out-of-home caregiver.	
	6.	Create CWS/CMS contact documenting date HEP was mailed to child's out-of-home caregiver.	
	7.	Forward <i>Foster Care PHN Recommendations (F063-28-339)</i> to assigned SSW.	
Assigned SSW	8.	Review <i>Foster Care PHN Recommendations (F063-28-339)</i> .	
	9.	Coordinate recommended follow-up care with child's out-of-home caregivers and medical providers pursuant to PHN's recommendations.	

10. Document planned and completed follow-up care in CWS/CMS case contact.