



Glossary of Common Terms Referenced in OR-Kids

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

A

- Active Participant:** A status of the case participant indicating current involvement.
- Activate/Deactivate:** Activate identifies the selected person as active. Deactivate identifies a currently active person as inactive.
- AFCARS (Adoption & Foster Care Analysis and Reporting System):** A system for collecting data on children in foster care and children who have been adopted under the auspices of the state child welfare agency. The system has a state and a federal component. The state component consists of the information system used to collect case management information and transmit the AFCARS data to the federal system. The federal system consists of the information system that receives the data, processes the data and checks it for compliance and quality, and the development of reports.
- In OR-Kids, fields that are labeled in red text require values for AFCARS reporting.
- AFCARS Exceptions:** OR-Kids identifies missing data that is required by the Adoptive & Foster Care Analysis Reporting System (AFCARS). The system identifies children that have AFCARS exceptions via a batch process that runs on a nightly basis. To view the exceptions, open the **Utilities** menu and select **AFCARS Exception**. The **AFCARS Exception** page displays with all fields blank. Upon executing a search and retrieving an individual, the page populates with information about the child selected from the search.
- Approvals:** OR-Kids provides approval processing to support business practice. Where a piece of work requires an approval, the approval option will be available from the **Options** list. The **Approvals** expando is

like an electronic "in box" where you see work pending approval and history of work approved. There are three sub-expandos that may display when you click this expando.

- **My Approvals** will list approvals for work pending but not submitted for approval, and work returned for rework. If you approve the work of others, work submitted for your approval will also be displayed.
- **Approvals in Progress** allows you to view items for which you provided approval that have not received final approval.
- **Approvals History** is not yet visible on your desktop. Once a piece of work you have completed is approved, you will see the work below this expando for four days.

Assessment:

The assessment is used to document the primary investigation of the allegation(s) from the screening report. Each CPS report that is assigned in the system needs to have an associated assessment completed. Parts of the assessment generally include documentation of some form of risk assessment, safety assessment, legal status, eligibility (if the child is placed outside the parental home), and use of case notes, etc. An FSS assessment is available for FSS reports requesting family support services.

Assessment Contact:

The assessment contact is a special type of case note, used specifically to document contacts made with the family and collateral contacts during the assessment process.

Assignments:

Assignments in OR-Kids provide the functionality for cases, providers, screenings and workers to be associated in the system. Caseloads are established through assignments. Only assigned cases display on the worker's desktop and most actions require an assignment to edit a case or provider. A case or provider may have multiple assignments, but one of the workers is identified as the primary worker and is considered responsible for the case. Worker's with secondary assignments have unlimited access to the case or provider. Once the primary assignment is created, it cannot be closed until the case itself is ready for case closure. The primary assignment can

be reassigned to another worker but the system will not allow it to be closed.

[Back to Top](#)

B

Banner: The OR-Kids banner displays at the top of the page and includes the main navigational buttons. The banner buttons offer quick access to system functions and include: Case Work, Provider Work, Search, Refresh, Print, Help, and Logout.

Batch process: A set of data or jobs to be processed in a single program run, usually over night.

Bulk Purchases: Purchases for multiple lots of an item such as bus passes or gas cards.

[Back to Top](#)

C

Cancel (on Approvals): An approval action. If cancel is selected the system designates the work as canceled. A warning message is displayed, when "Canceled" is selected, to inform the worker that their work will become final and frozen if they continue to proceed. Each person on the approval chain will be able to view the canceled designation on his or her own approval outliner.

Case: All created, documented and approved work on an individual or family is compiled as a case in OR-Kids. The case is created under one person's name, generally the female head of household. A case in OR-Kids must have at least one active participant and one report linked to it. Cases are assigned to workers, support staff, SSAs, eligibility workers, etc. and each case should have one and only one primary assignment to it.

Case Name: In most instances the mother/female head of household is the case name, a role assigned on the **Participants** tab of the **Screening Report** page. If the mother is truly not a part of the family/case, she should not be listed as the case name. There is a **Case Name Decision Tree** hyperlink on the **Decisions** tab of the **Screening Report** page to

help you identify the most appropriate family member to use as the case name.

- Case Note:** Case Notes are used to document case information and case management contacts made throughout the life of the case. Previously created notes can be found in the **Cases** expando under the **Case Note** icon. Any worker can make a case note on a case, and not just the assigned worker.
- Certification:** Home providers undergo a certification process. Certificates for home providers are recorded in OR-Kids and a child may not be placed with a home provider until they possess the appropriate certification.
- Check Box:** Check boxes are used when allowing the user to select multiple items. Checking a box indicates that the user agrees with or believes the statement to be true.
- Copy Over:** The copy over functionality allows the user to copy information entered in a pending or approved piece of work (for example, an ongoing safety plan) over into a new pending piece of work so that the information can be edited without starting from scratch.

[Back to Top](#)

D

- Data Retrieval Search:** A search completed to retrieve existing OR-Kids data to bring back to the pages from where the search started.
- Date Restricted (view):** The **Date Restricted** checkbox is the default view for the outliner. The date restricted view limits the amount of work displayed on the outliner to the most recent items.
- Delete Person:** Deleting a person record removes all records associated with the person (names, addresses, relationships) from the OR-Kids database. All person record deletions will be performed in person delete batch process in which all persons marked for deletion are removed from the OR-Kids database.
- Designated Branch:** All foster home records in OR-Kids are allowed to be maintained by only one branch at a time. The designated branch is typically the branch who certifies the home. This ensures the home provider

demographics, services, training, payee and certification information is maintained by the branch with the most accurate information.

*The designated branch of a home provider is automatically determined in OR-Kids based on the branch of the supervisor who approves the initial home inquiry.

Dialogue Box:

A dialogue box displays OR-Kids messages.

[Back to Top](#)

E

Expandos:

Expandos are triangle icons with + or – signs in them. Clicking on an expando with a + sign reveals more rows with icons that you click on to “drill down” or expand to find additional information. When text next to the row with the expando is blue and underlined it is a hyperlink that the user can click on to open the specific piece of work. Clicking on the – sign will collapse/close the expando.

Escalated Ticklers:

If work is not completed by a specific due date, the tickler notification moves to the **Escalated Ticklers** expando. Click the **Escalated Ticklers** expando to view the list of cases or providers with overdue ticklers.

[Back to Top](#)

E

File Cabinet:

A tool in OR-Kids that allows you to store images (scanned items) and documents associated with a case that has not been created by the OR-Kids system. For example a psych report received on a case participant, or other items/images that need to be scanned into the OR-Kids file cabinet. You can upload images into the file cabinet and view them in the **Cases** expando.

[Back to Top](#)

G

Group Box:

A way a page is organized for ease of use. Related fields are often grouped together and organized within a section on the page.

[Back to Top](#)

H

- Home Provider:** A provider in OR-Kids that provides foster home, adoptive home or relative foster care services.
- Hyperlinks:** Actions can be performed using hyperlinks. All hyperlinks are underlined and blue in color. Many hyperlinks are found throughout OR-Kids on different pages and tabs. There will be no change in color to indicate hyperlinks you have already visited.

[Back to Top](#)

I

- Interface:** An automated data exchange between OR-Kids and other automated systems such as the Client Index or MMIS.

[Back to Top](#)

L

- Launch:** To initiate the generation of a window, document, form or report in OR-Kids.
- Legal Action:** The **Legal Action** page is where court intervention for a child (or parent /caretaker) is documented. There must be a legal action such as a dependency petition recorded in OR-Kids before there can be a legal status. Most legal documents can be created in OR-Kids (*See below*).
- Legal Document:** All legal documents in OR-Kids are stored under the **Legal** icon in the **Cases** expando. Legal documents include various court reports, etc.
- Legal Status:** The legal status of a child refers to both the OR-Kids page where the action of a court is recorded and the recorded status of a child under a court order.
- Licensing:** Private providers undergo a licensing process. A private provider's license is recorded in OR-Kids.

[Back to Top](#)

N

Navigational Search: A Search of the OR-Kids database to locate and view information in the system that the worker is authorized to see. From the **Navigational Search** page the worker can view, but cannot update, information.

NCANDS (National Child Abuse and Neglect Data System): Is a voluntary national data collection and analysis system that aims to facilitate the secondary analysis of research data relevant to the study of child abuse and neglect. Some information recorded about both children and care givers is used for NCANDS reporting.

[Back to Top](#)

O

Ongoing: The term "ongoing" refers to a case that has moved from the initial assessment process and remains open for the agency to continue to provide services. Ongoing workers will complete processes like legal actions, permanency plans, case plans, update safety plans and case progress evaluations. They will most likely monitor a placement or an intact family that is receiving services from the agency and maintain the family's case plan.

Outliner: In the outliner area, the worker is presented with his or her own 'desktop' with their specific work items displayed based on caseload assignments of those work items.

[Back to Top](#)

P

Page: A typically rectangular, separately controllable area of the screen. Used synonymously with window.

Parent Agency: An agency (i.e. Catholic Social Services or Maplestar) that is responsible for the oversight/supervision of a home or private provider. Parent Agency information is documented using the

Parent Agency History pop-up page which is launched from the **Home Provider** page or the **Private Provider** page.

- Participant view:** The **Participant View** checkbox displays each family's case and its active participants. By clicking on a **Case Participant** icon, the case work completed and in progress for that participant is displayed.
- Payment:** System generated payments based on the services rendered by a provider as documented by the case worker in OR-Kids using the **Placement and Services** page. Additionally, financial workers may record one-time payments to providers for invoiced services such as counseling.
- Payment (In Process):** Means that a check was not cancelled in the pending process and is waiting to be printed and mailed. It is important to note that the check status will remain "In Process" until OR-Kids assigns the check #s and check dates. Thereafter, the status is then set to "Outstanding."
- Payment* (Outstanding):** Means that the check number has been assigned by OR-Kids and is recorded as having been printed and mailed to the provider. The check number and check date that appear, correspond with the actual check number and the date of the actual mailing
- Payment (Pending):** A check's status will appear as pending prior to the check being printed and mailed. The check will have a pending status from the time the batch process is run where all pending checks will then be converted to "in process."
- ***Important distinction:** When a check is in "pending status" you may cancel or stop this payment.
- Payment Request:** Payments in OR-Kids are generally tied to a placement. However, in some instances you can request a "one-time payment" for things like clothing allowance or transportation costs through the payment request module.
- Piece of Work:** Is a discrete activity related to a specific case or provider that has a specific timeframe for completion. Examples of pieces of work are screening report, assessment, placement, certification, one-time payment, Title IV-E eligibility.

Placement:	A placement of a child with a provider providing out of home services. These providers may be private providers or home providers.
Precision Slider:	Using the name fields criteria, workers can either expand or refine their searches by using the search precision tool. The search precision slider has five settings: Low, Low/Med, Med, Med/High, and High. The lower the search precision, the more results that are returned based on the spelling of the information entered in the name fields. Setting the search precision to High will bring back only those results that are an exact match of the name spelling entered.
Private Provider:	A provider, individual or agency, that provides any service (i.e. counseling) other than foster home, adoptive home, or relative foster care services.
Provider Note:	Similar to a case note except entered into a provider's file.

[Back to Top](#)

R

Recall/Return (on Approvals):	An Approval action. OR-Kids records the recall for all persons in the approval chain, and future approval of the work must start from the beginning. (Also, a recall will be recorded if a piece of work is changed at any time while it is in the approval process.)
Radio Button:	Radio buttons are used to select one element from a list of possible options.
Request for Placement:	The automated process in OR-Kids where a case worker assigned to a case has a child in need of a placement resource requests a placement resource from the staff responsible for managing placement resources.
Required Fields:	Some lists or text boxes on various pages in OR-Kids are highlighted with blue to indicate that they are mandatory and must be completed prior to completing a piece of work.
Reporter role:	Identifies the individual that communicated the case information. A reporter is <u>only</u> given the role of reporter (and not an additional role like non-household member) or the reporter will be pulled into the case as a participant.

[Back to Top](#)

S

Screening:

Screening encompasses the documentation of a telephoned, faxed, or walk-in report. Screenings are recorded in OR-Kids as screening reports, which can be FSS or CPS types. Screening is the pre-cursor to the development of a case.

*Screening reports can be linked to existing cases, but are not cases until a decision is made and they are assigned as such. Closed at Screening reports that are linked to previously closed cases through the Link Case process will not re-open the closed case. A case will be automatically closed when it is created from a Closed at Screening report for a family not previously known to the system.

Service:

Any service delivered to a child or family that is not an out-of-home placement, for example, counseling, or day care.

[Back to Top](#)

I

Tab:

Tabs organize and group related information and fields together. Users access a tab by clicking anywhere in the tab name area to view or maintain information on that tab.

Ticklers:

A reminder that certain work needs to be accomplished by a certain due date. Ticklers are displayed in your outliner and indicated with a red feather icon.

Trigger:

An action taken in OR-Kids that creates the need to take a subsequent or related action.

[Back to Top](#)

V

View Canceled:

When the **View Canceled** check box is selected, OR-Kids displays all provider and case work which was previously canceled in addition to the default view.

[Back to Top](#)

