

Volunteer Case Procedure Checklist

- ☐ Attend Initial Case Team Meeting
- ☐ Reach out/Interview Resource Parent: ____/____/____
- ☐ Make an appointment and see the child/ren: ____/____/____
- ☐ Reach out/Interview Caseworker: ____/____/____
- ☐ Reach out/Interview Birth Parents: ____/____/____
- ☐ Reach out/Interview Guidance Counselor/Day Care Director: ____/____/____
- ☐ Make appointments with other important parties involved and maintain contact to gather up to date information. This might include Therapists, Division Nurse, Medical Professionals, etc.

NOTE: If problems occur with getting information, contact your Peer Coach to facilitate information gathering. The Peer Coach will assist you and help you follow the proper procedure for difficulty contacting parties.

- ☐ Document all case activities including Contact Logs (time/mileage records) in Optima within 1-2 days
- ☐ Review information gathered with your Peer Coach (at least once a week for the first three months and subsequently at least once a month)
- ☐ Visit child/ren **twice per month every month.**
- ☐ Attend 30-day Team Meeting to confirm areas of Advocacy with Peer Coach and review the Well-Being/Advocacy Checklist: ____/____/____
- ☐ Complete Initial Well-Being Assessments on the children in Optima within 60 days of appointment
- ☐ Attend 60-Day Workshop: ____/____/____
- ☐ Attend In-Person Three-Month Evaluation Meeting: ____/____/____
- ☐ Check in with DCP&P caseworker monthly
- ☐ Check in with Birth Parents monthly
- ☐ Check in with collateral contacts quarterly
- ☐ Check the Hearings tab in Optima for upcoming court dates and court report due dates
- ☐ Submit Court Reports for the Judge at every hearing, approximately every three months, to your Peer Coach **14 days prior** to each hearing
- ☐ Attend court dates when possible
- ☐ Complete both a Physical/Behavioral Health and Educational Well-Being Assessments on the children twice a year (January and June) in Optima
- ☐ Participate in an Annual Volunteer/Case Evaluation Meeting
- ☐ Complete 12 hours of in-service or independent training.
- ☐ Monitor case until permanency is achieved
- ☐ Complete Closed Well-Being Assessments on the children in Optima prior to case closure
- ☐ Complete Case Ending Survey through Survey Monkey link when case is closed

**Please note that these are general timelines. Your Peer Coach and Program Coordinator will advise you on timelines for your specific case.*

