VERIFIED NARRATIVE CONSULTING

Agency Documentation Risk Sample Packet

Placement Stability & File Readiness Risk Snapshot

A demonstration of how a foster licensing agency can organize placement disclosure, home capacity matching, file readiness, and supervisor follow-up into one reviewable documentation system.

Inside this sample

SAMPLE DEMONSTRATION TOOL

FREE AGENCY DOCUMENTATION RISK SAMPLE PACKET

Agency Placement Stability & File Readiness Risk Snapshot

Prepared as a sample demonstration of Verified Narrative Consulting agency-facing documentation tools

✓ **Purpose**
This sample shows how a foster licensing agency can organize placement disclosure, home capacity matching, file readiness, and supervisor follow-up into one reviewable documentation system. It is a demonstration sample only and should be customized to the agency's state rules, contracts, internal policies, and case management system before implementation.

Built for urgent placement decisions — without removing documentation discipline.

How Agencies Use This Packet

This sample is designed as a triage framework. Agencies may use a shortened rapid screen for urgent placement calls and reserve the full review for high-acuity referrals, unknown safety variables, conditional placements, emergency placements, or post-placement reconciliation.

1. Before Placement	2. At Approval	3. During QA Review	4. Supervisor Follow-Up
Intake staff document what was disclosed, denied, unknown, or missing during the referral call or email exchange.	The proposed home is reviewed against the child's acuity, household composition, supervision limits, and caregiver capacity.	QA or supervisory staff check whether medical, school, court, medication, visit, incident, and support documentation is complete.	Risk flags are converted into structured follow-up tasks so gaps do not sit unnoticed.

What This Demonstrates

- A third-party documentation lens that separates facts from assumptions during rushed placement decisions.
- A structured method for showing what the agency knew, what the agency asked, what was unavailable, and what required escalation.
- A practical bridge between placement stability, licensing readiness, worker consistency, and supervisor visibility.
- A low-burden framework agencies can customize without rebuilding their whole case management system.

Suggested Pilot Offer

Offer Name	Agency Placement Stability & File Readiness Pilot
Pilot Scope	45-60 minute structured consultation, short pre-call snapshot, review of one documentation workflow, and a 1-2 page recommendation memo.
Introductory Rate	$500 introductory rate for the first pilot engagement.
Optional Upsell	Custom tool buildout, agency portal setup, staff implementation guide, or monthly QA/file-readiness support.

Customization
The sample is a standard demonstration. Paid agency buildouts can be shortened, expanded, or restructured around the agency's actual placement workflow.

Implementation Boundary

This sample is not a legal opinion, legal representation, licensing determination, clinical treatment plan, or substitute for agency counsel, state licensing guidance, or contract requirements. Completed child records, medical information, and foster home files should remain in the agency's approved record system. VNC portals should store blank templates, fictional samples, training aids, and version-controlled resources unless proper privacy/security agreements are in place.

Placement Intake Risk Snapshot

Use before accepting placement, or within the same business day for emergency placements. Unknown or unavailable information is not neutral; it becomes a supervisor review variable.

Speed & Customization Note

This sample is not intended to slow urgent placement decisions. It demonstrates a structured triage method agencies can customize into a rapid 5–10 minute placement screen, a full intake review, or a post-placement reconciliation workflow based on their staffing model, placement volume, and state requirements.

✓ Minimum Viable Documentation

The goal is not more paperwork. The goal is minimum viable documentation: enough structure to show what was known, what was missing, who accepted, and what follow-up was required.

LEVEL 1: Rapid Placement Risk Screen

Time burden: 5–10 minutes

Used during urgent placement calls. Answer only the deal-breaker questions:

- Child age and reason for placement move
- Aggression toward younger/smaller children, elopement, or fire-setting risk
- Current medications or medical complexity
- Younger/vulnerable children already in the home
- — and other deal-breaker screening questions

This is the fast gatekeeping screen.

LEVEL 2: Full Placement Intake & Match Review

Time burden: 15–25 minutes

Used when:

- Placement is high-acuity or key information is unknown
- Foster home has younger/vulnerable children, or placement is emergency/after-hours
- Family accepts conditionally, or the agency needs post-placement reconciliation

Not used during every placement call.

A. Referral Source Record

Referral date/time: ______________________ **Referring worker/unit:** ______________________

Child age / DOB: ______________________ **Placement type:** ______________________

Prior placement move reason: ______________________ **Records requested:** ______________________

B. Disclosure Capture Matrix

Risk / Acuity Area	Disc.	Den.	Unk.	Details / Records Requested
Physical aggression / assault	■	■	■	
Aggression toward younger or smaller children	■	■	■	
Sexualized behaviors / boundary concerns	■	■	■	
Elopement / running / unsafe exits	■	■	■	
Fire-setting / severe property destruction	■	■	■	
Animal safety concerns	■	■	■	
Active psychotropic medication or recent medication change	■	■	■	
Self-harm, suicidal ideation, or psychiatric hospitalization	■	■	■	
School exclusion, IEP/504, or behavioral school plan	■	■	■	
Medical/developmental complexity or equipment needs	■	■	■	
Active safety plan, probation term, or court restriction	■	■	■	

C. Home Capacity Match Check

Capacity Variable	Clear	Concern	Required Note / Support

Capacity Variable	Clear	Concern	Required Note / Support
Ages and vulnerability of children already in the home	■	■	
Existing medical/developmental needs in the household	■	■	
Bedroom layout and ability to provide line-of-sight supervision	■	■	
Caregiver work schedule, transportation burden, and backup support	■	■	
Recent placement stress, disruption, complaint, investigation, or open CAP	■	■	
Training/experience match for disclosed acuity areas	■	■	

D. Supervisor Follow-Up Flag

Flag Level	Use When	Required Action
Immediate / Pre-Acceptance Review	Safety conflict, vulnerable child match concern, or critical unknown	Placement coordinator escalates before accepting whenever possible
Same-Day Conditional Approval	Home may accept only with added supports, safety steps, or missing-record follow-up	Document conditions and assign follow-up owner
24-Hour Post-Placement Reconciliation	Emergency placement occurred before full records were available	Request missing placement packet, meds, appointments, school, visit, and support information
72-Hour QA Follow-Up	Low-risk missing item or routine file cleanup	Confirm receipt or keep tracking open

Foster Provider Acceptance Method

- Email confirmation
- Text confirmation copied to file, if allowed by agency policy
- E-signature form
- Verbal emergency acceptance documented by placement coordinator, written confirmation requested same day

✓ **Acceptance wording**
Foster provider confirms they reviewed the currently available placement information, including known disclosures and unknown/pending areas, and agrees to accept placement based on the information available at the time.

Placement decision: ■ Proceed ■ Proceed with supports ■ Hold for supervisor review ■ Decline / not compatible

PAGE 2 OF SAMPLE: FILE READINESS CHECKLIST

Use as a monthly, quarterly, or post-transition review. The goal is to identify missing records and follow-up obligations before a state review, complaint, disruption, or staff transition exposes the gap.

A. Audit Record

Child / Case ID	______________________________ _	**Placement Date**	______________________________ _
Assigned Worker	______________________________ _	**Review Date**	______________________________ _

B. File Readiness Review

File Area	Present	Current	Missing / Concern	Follow-Up Owner / Due Date
Placement packet / referral disclosure record	☐	☐	☐	_________________
Custody authority, court order, case plan, or placement authorization	☐	☐	☐	_________________
Emergency contacts and medical consent documentation	☐	☐	☐	_________________
Current safety plan or behavior support plan	☐	☐	☐	_________________
Initial well-child/EPSDT or required physical exam status	☐	☐	☐	_________________
Dental exam / oral health record status	☐	☐	☐	_________________
Medication orders, bottle label, administration log, and recent changes reconcile	☐	☐	☐	_________________
Psychotropic medication consent/monitoring documentation when applicable	☐	☐	☐	_________________
Behavioral health referral, assessment, therapy, or service authorization status	☐	☐	☐	_________________
School enrollment, report card, IEP/504, or education contact record	☐	☐	☐	_________________
Monthly face-to-face visit note is dated, specific, and signed/verified per agency policy	☐	☐	☐	_________________
Caregiver support requests, respite requests, and state/agency follow-up trail	☐	☐	☐	_________________
Incident reports, complaints, grievances, or CAPs have closure documentation	☐	☐	☐	_________________
Narratives are child-specific and not duplicated across months without new facts	☐	☐	☐	_________________

C. Supervisor Disposition

Disposition	Meaning	Next Step
☐ **PASS**	No critical missing item identified during this review.	Next routine review date: ____/____/____
☐ **MONITOR**	Non-critical item missing or approaching deadline.	Assign owner and confirm within 72 hours.
☐ **SUPERVISOR ACTION REQUIRED**	Critical record, safety item, visit verification, medication issue, or unresolved support request identified.	Supervisor review within 24-48 hours; document action taken.

D. Closing Notes

Top 3 Missing Items	1. ____________________ 2. ____________________ 3. ____________________
Required Escalation	☐ DCS/state worker ☐ Licensing supervisor ☐ Program director ☐ Agency counsel/compliance ☐ Other: __________
Supervisor Signature	____ Date: ____/____/____

Recommended use: convert repeated missing items into a monthly QA trend report. The value is not the checklist itself; the value is supervisor visibility, version control, and closing the loop before the file is reviewed under pressure.