SOCIAL WORK DATA POINTS

Manual

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MICHIGAN INDIGENT DEFENSE COMMISSION

Public Defender

Ottawa County

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This manual is the product of a collaboration between the Michigan Indigent Defense Commission (MIDC), the Muskegon County Public Defender's Office, the Ottawa County Public Defender's Office, and many other social workers in public defense around the state. It is intended for the benefit of indigent criminal defense systems throughout Michigan, to direct the procedures for collecting data on social work services and outcomes delivered alongside public defense services.

Chapter 1
The Importance of Tracking Data

Data collection is critical to the success of any intervention. Understanding what is happening on the ground through data rather than solely through anecdotes can improve local practice and procedures as practitioners refine program approaches and models. Data can also be useful in bolstering support for an intervention or making arguments for new or sustained funding. This manual is a first step toward standardization in social work data points across the state. As a reminder, everything in this manual is a suggestion and not a mandate.

Chapter 2
Tracking the Data

Through conversation with social workers across the state, this working group has identified three data points that are critical for all systems utilizing social workers to track:

1.The number of **cases referred to social workers** in each office or system ("social work referrals")
2.The number of **cases handled by social workers** in each office ("social work interventions")
3.The amount of **time spent** on social work interventions

Since many public defender systems currently use defenderData, this manual addresses how social work data can be tracked in this case management system. Systems utilizing other case management systems can also easily track these data points through their platforms or through simple spreadsheets.

Through the defenderData platform, the first two data points – social work referrals and social work interventions – can be tracked using flags or the schedule tab. Individual counties are able to decide if the flagging system or the schedule tab is their preferred location for tracking social work referrals and interventions. Additionally, these two data points can be tracked in both places if a county so chooses. The third data point is more in depth and, as such, this manual provides more specific guidance as to how it can be tracked to maintain consistency across the state.

This chapter will go through each data point in more detail, including options for tracking the first two data points and specific recommendations on how to track the third data point.

Data Point 1
Tracking Social Work Referrals

The first data point tracks how many cases are referred to the social worker(s) in any given county office. This data point can be tracked using flags or the schedule tab in defenderData. Every county can decide which tracking method is best for its office. The same code for tracking referrals is used in both the flagging system and the schedule tab: SWREF.

Table 2.1a: Tracking social work referrals in schedule tab. The following table gives an example of how social work referrals can be tracked in the schedule tab. The SWREF code should only be used one time per case. Be sure to change the "date" and "time" in the schedule tab to accurately reflect when the referral was made. If the "time" is unknown, leave the default time of "08:00 AM."

Table 2.1a: Tracking Social Work Referrals in Schedule Tab

In defenderData, open the case that has been referred to the social work team:

→ Click "Add" to add an event

→ Select "SW Referral" from drop-down menu → Change "date" and "time" → Select referring attorney as "Organizer" from drop-down menu → "Subject" is left blank

→ Click "Save" then Click "Add Notes" → In "Add Notes" write the type(s) of referral(s) for which the client was referred

→ Click "Save/Exit" → For example: "Referred for: substance abuse, mental health, homelessness"
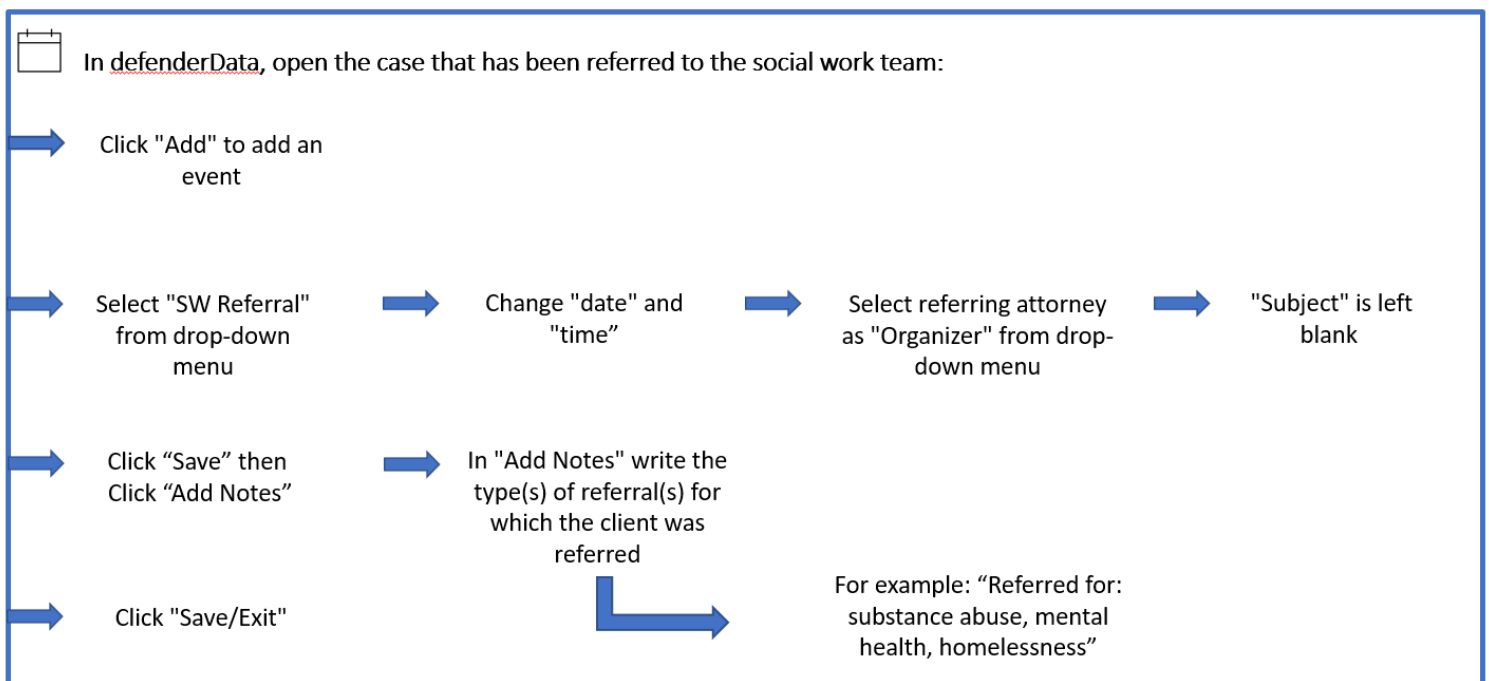
Table 2.1b: Tracking social work referrals with flags. The following table gives an example of how social work referrals can be tracked using flags. The SWREF code can only be used one time per case.

Table 2.1b: Tracking Social Work Referrals with Flags

In defenderData, open the case that has been referred to the social work team:

Click on the "flags" icon above the case information → A window will pop up → Scroll down to **SWREF**

Check the box corresponding to the **SWREF** code → Click "Save"

Data Point 2
Tracking Social Work Interventions

The second data point tracks how many referred cases receive intervention from the social worker(s) in any given office. Like the first data point, this data can be tracked through using flags or the schedule tab in Defender Data. Every county can decide which tracking method is best for its office. The same code for tracking social work interventions is used in both the flagging system and the schedule tab: **SWINV.**

Table 2.2a: Tracking social work interventions in schedule tab. The following table gives an example of how social work interventions can be tracked in the schedule tab. The SWINV code should only be used one time per case at the time of the first intervention on the case. Be sure to change the "date" and "time" in the schedule tab to accurately reflect when the intervention occurred. If the "time" is unknown, leave the default time of "08:00 AM."

Table 2.2a: Tracking Social Work Interventions in Schedule Tab

In defenderData, open the case handled by a social worker:

→ Click "Add" to add an event

→ Select "SW Intervention-SWINV" from drop-down menu → Change "date" and "time" → Select the name of the intervening social worker as "Organizer" from drop-down menu. Select "PD intern" if intervening social worker is an intern → "Subject" is left blank

→ Click "Save" then Click "Add Notes" → If intervening social worker is an intern, use "Add Notes" to write the name of intervening intern

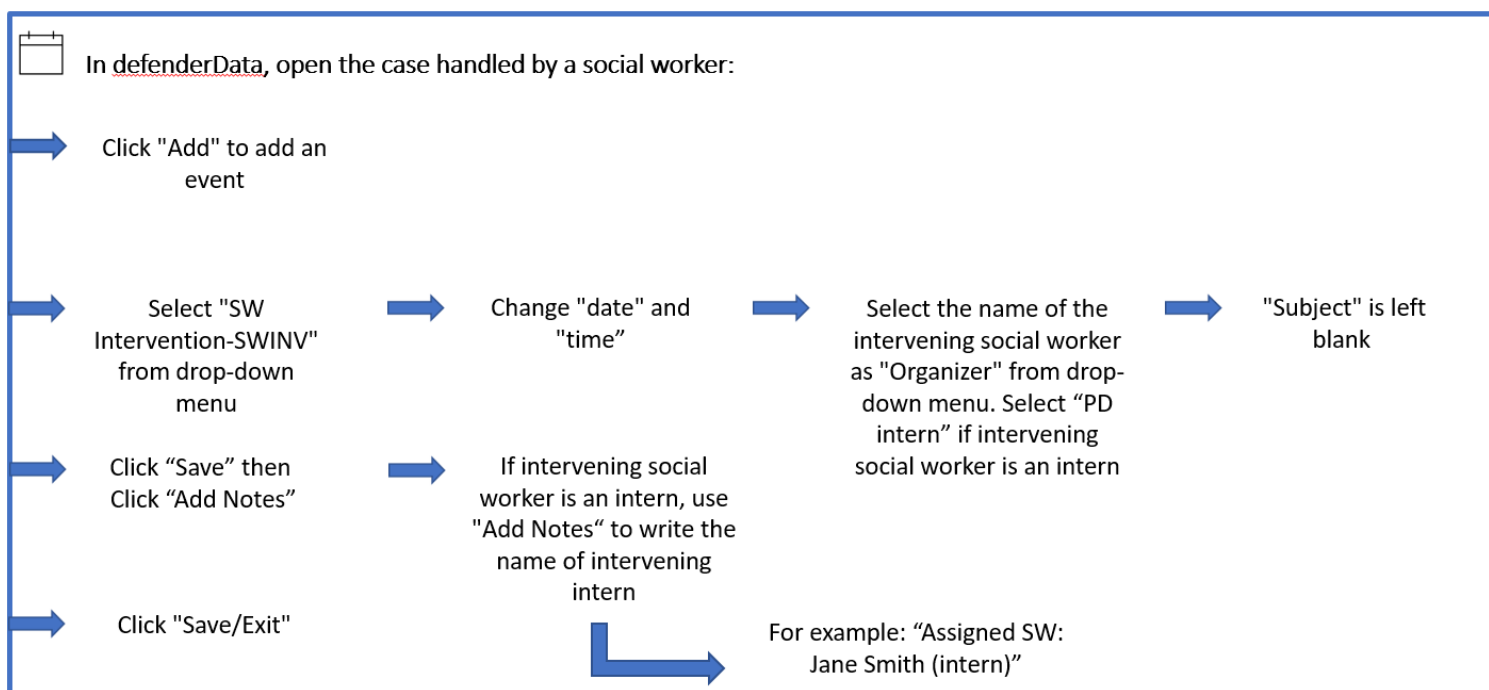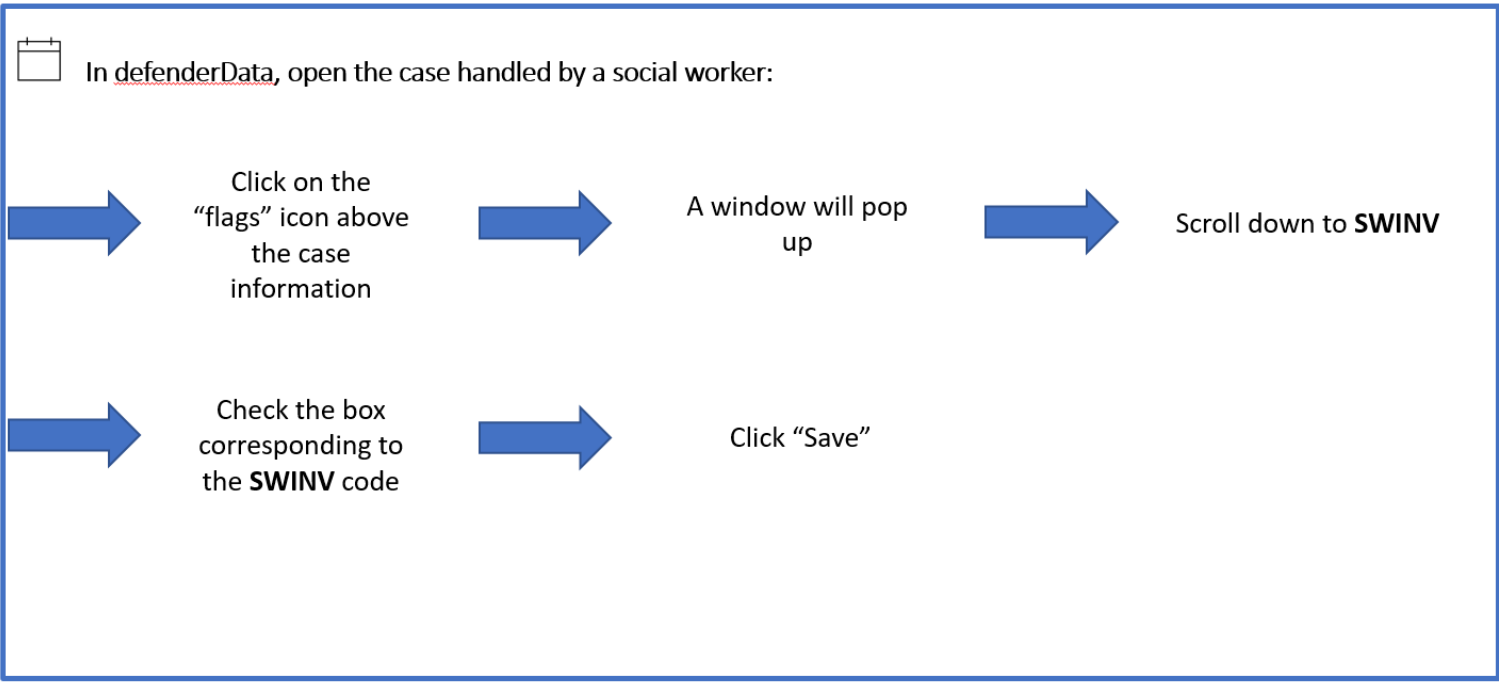→ Click "Save/Exit" → For example: "Assigned SW: Jane Smith (intern)"

Table 2.2b: Tracking social work interventions with flags. The following table gives an example of how social work interventions can be tracked using flags. The SWINV code can only be used one time per case.

Table 2.2b: Tracking Social Work Interventions with Flags

In defenderData, open the case handled by a social worker:

→ Click on the "flags" icon above the case information → A window will pop up → Scroll down to **SWINV**

→ Check the box corresponding to the **SWINV** code → Click "Save"

Chapter 3
Social Work Codes Defined

SWAG   SW Agency Meeting

Use this code for any meeting with an agency on behalf of a client. This includes meeting with an agency the client is already involved with, meeting with a partner agency the social worker is trying to get a client involved with, or an initial meeting with an agency to build a partnership.

SWCC   SW Case Consult

Use this code when a social worker meets with another professional to advise, problem solve, or otherwise assist with clients. This code is also used when a social worker meets with an attorney on a shared case.

SWCS   SW Client Court Support

Use this code anytime a social worker attends court with or on behalf of a client/case.

SWINT   SW Client Intake

Use this code anytime a social worker conducts an intake/biopsychosocial assessment, including time spent writing any notes from the assessment.

SWMT   SW Client Meeting

Use this code for all meetings with a client (outside of jail visits).

SWCI   SW Crisis Intervention

Use this code when a social worker works with a distressed client to de-escalate and support the client to prevent further damage or deterioration.

SWFM   SW File Management

Use this code for all case note write-ups (excluding those related to client intake) and filing.

Social Work Codes Defined

continued...

SWINV **SW Intervention**

Use this code for the first contact, or attempted contact, by the assigned social worker. This includes ANY attempt at intervention, regardless of whether the client responds or engages in the intervention attempt.

SWJAIL **SW Jail Visit**

Use this code for jail visits, in person or over video conference.

SWMH **SW Mental Health Referral**

Use this code anytime a social worker refers a client for mental health services.

SWMIT **SW Mitigation Report**

Use this code for all time spent writing and researching for mitigation reports.

SWCAM **SW Mitigation Report Started**

Use this code whenever a social worker begins a mitigation report.

SWCAMS **SW Mitigation Report Submitted**

Use this code whenever a social worker submits a completed mitigation report.

SWNSP **SW Natural Support**

Use this code for meetings and coordination with family and friends of a client.

SWREF **SW Referral**

Use this code every time a social worker receives a referral.

SWSA **SW Substance Abuse Referral**

Use this code anytime a social worker refers a client for substance abuse treatment.

Chapter 4
Social Work Codes in Schedule Tab

Use the schedule tab to track that an event/intervention happened. The event can happen more than once and should be tracked with the appropriate code every time it happens. (Example: jail visit or client meeting)

4.1 Primary SW Codes to be Tracked in Schedule Tab

The following social work codes can be used in the schedule tab any time each of the following interventions or activities occur. Through conversations with social workers around the state, the following were identified as the most important types of events to track.

o **SWCS**   **SW Client Court Support**
o **SWINT**   **SW Client Intake**
o **SWMT**   **SW Client Meeting**
o **SWCI**   **SW Crisis Intervention**
o **SWINV**   **SW Intervention**
o **SWJAIL**   **SW Jail Visit**
o **SWMH**   **SW Mental Health Referral**
o **SWCAM**   **SW Mitigation Report Started**
o **SWCAMS**   **SW Mitigation Report Submitted**
o **SWNSP**   **SW Natural Support**
o **SWSA**   **SW Substance Abuse Referral**

4.2 Secondary SW Codes to be Tracked in Schedule Tab

The following codes may prove useful as well and should be used when it is helpful, alongside any other unique codes that systems choose to create.

o **SWAG**   **SW Agency Meeting**
o **SWCC**   **SW Case Consult**
o **SWFM**   **SW File Management**
o **SWREF**   **SW Referral**

Chapter 5
Social Work Codes with Flags

Flags are used to track data that only needs to be tracked one time per case. Flags track that an event/intervention happened.

- **o SWINV**   **SW Intervention**
- **o SWMIT**   **SW Mitigation Report**
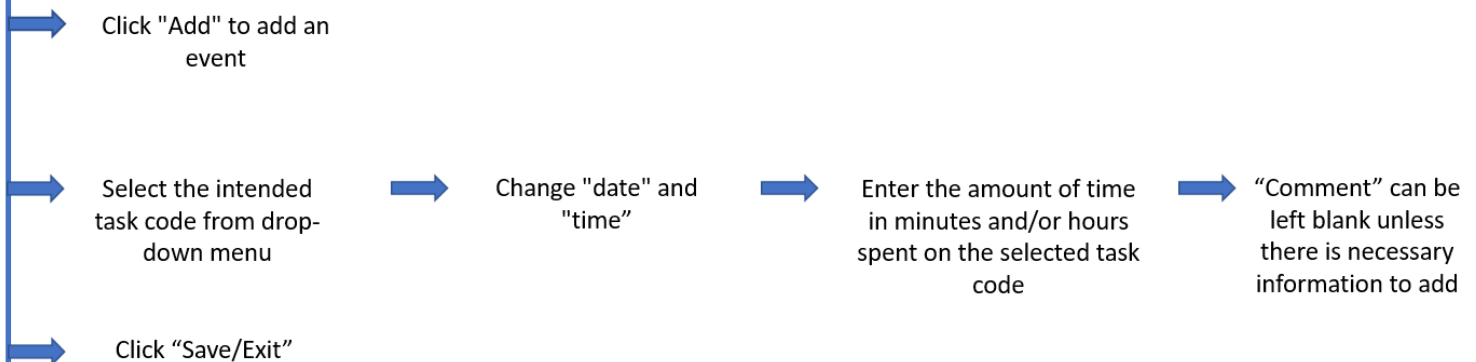- **o SWREF**   **SW Referral**

Chapter 6
Social Work Codes and Time Tab

6.1 Tracking Social Work Time in Time Tab

The following table gives an example of how the amount of time spent on social work events can be tracked in the time tab. The time tab more accurately reflects time as it gives the option to enter time by minutes and hours. This tab should be used on tasks for the individual case assignment that the task is dedicated to.

Table 6.1: Utilizing the Time Tab

Time tab:

➡ Click "Add" to add an event

➡ Select the intended task code from drop-down menu   ➡ Change "date" and "time"   ➡ Enter the amount of time in minutes and/or hours spent on the selected task code   ➡ "Comment" can be left blank unless there is necessary information to add

➡ Click "Save/Exit"

6.2 Primary SW Codes to be Tracked in Time Tab

The following social work codes can be used in the time tab any time each of the following interventions or activities occur.

o **SWAG**   **SW Agency Meeting**
o **SWCC**   **SW Case Consult**
o **SWCI**   **SW Crisis Intervention**
o **SWCS**   **SW Client Court Support**
o **SWFM**   **SW File Management**
o **SWINT**   **SW Client Intake**
o **SWINV**   **SW Intervention**
o **SWJAIL**   **SW Jail Visit**
o **SWMIT**   **SW Mitigation Report**
o **SWMT**   **SW Client Meeting**
o **SWREF**   **SW Referral**

Acknowledgments