

Your Responsibilities

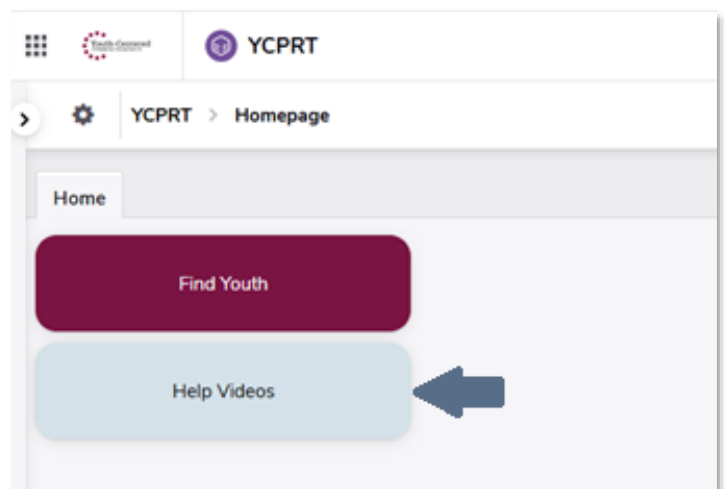
Thank you for joining the YCPRT team as a Scribe. In this vital role, you'll document the Permanency Roundtable (PRT) and the Youth-Centered Permanency Roundtable (YCPRT) meetings and action items using both Quickbase and the SACWIS applications. But your impact goes far beyond note-taking. Scribes are active contributors during meetings—engaging in discussions, offering ideas during brainstorming sessions, and helping shape planning decisions. Your voice and insights are valued as part of the collaborative process that drives successful outcomes for the youth.

Helpful Tools

Scribes play a dual role: capturing meeting notes in Quickbase and SACWIS, and actively engaging in PRT and YCPRT discussions. To be effective in both responsibilities, it's important to familiarize yourself with these tools ahead of time. Take the opportunity to explore Quickbase and SACWIS before your first meeting to ensure you are prepared.

Quickbase

Quickbase serves as the primary application for documenting the content of PRT and YCPRT meetings. Each partner site is provided with its own site-specific login credentials, granting access to youth records relevant to their YCPRT program. Scribes are assigned permissions within Quickbase to create and edit meetings for the youth they are supporting.



To support your work, Quickbase includes brief help videos that offer useful guidance for performing the Scribe role effectively. It is recommended that you watch these videos prior to participating in your first meeting to become familiar with key features and best practices.

To access the videos, login to Quickbase and select the *Help Videos* button located on the Homepage.

SACWIS

Upon completion of each PRT and YCPRT meeting, the Scribe or Agency Designee is responsible for entering the meeting details into SACWIS under the *Family Team Meeting* tab. View the [DCY instructional video](#) to learn how to access SACWIS and where to enter meeting details.



Supportive Scribe Scripts

As a Scribe, your involvement goes beyond documentation—you're an essential part of the conversation. During each YCPRT meeting, you'll actively participate by introducing yourself and your role, engaging in the strengths bombardment to highlight the youth's positive attributes, and ensuring that all action items are accurately captured with clearly defined and agreed-upon timeframes.

To support you, we've included helpful sample scripts to guide your participation and give you confidence as you step into this role.

Sample Introduction

"Hello! My name isand I'm here today serving as the Scribe on your YCPRT team. The Scribe takes notes and makes sure that we accurately document what was discussed during the meeting in order to support you and the team. I will work hard to make sure the notes make sense to you. I'm excited to be a part of your journey!"

Sample Strength Bombardment (when you have not yet met the youth)

"While I am just meeting you, I look forward to getting to know you even more during our meetings. I find it very courageous of you to show up and be here today!"

"When you walked into the room, the first thing I noticed was your smile! It lights up a room!"

"I love the energy you brought into the room today. I can tell you are very passionate about this process and ready to work with your team!"

Sample Wondering and Follow Up Questions

"I'm wondering what else we can add to this action step to ensure there is a timeframe to support its completion."

"Could we pause for a moment so I can clarify the action step we are discussing to ensure the details are noted accurately?" *Following this statement, it would be appropriate to summarize the recent discussions and work with the team to formulate an action item, identify barriers and plan to overcome them, confirm the person(s) responsible and the timeline.

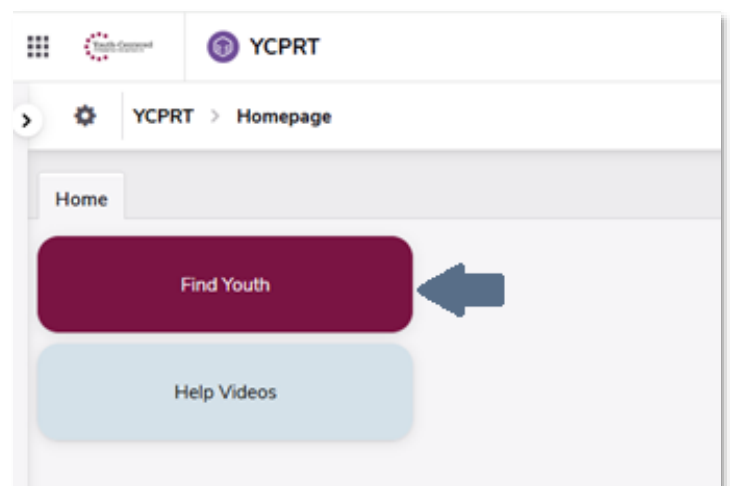
"(youth name), did I capture this correctly?"

Documentation Process

Follow these steps when preparing for and documenting the PRT or YCPRT meeting.

1. Prepare for the Meeting

Prior to the start of the meeting, login to Quickbase. On the Homepage, click the *Find Youth* button.



Role of the YCPRT Scribe



Enter the youth's SACWIS ID and click the *Display Report* button to locate their record.

A screenshot of the YCPRT 'Find Youth' interface. The breadcrumb trail shows 'Youth Reports' > 'Settings' > 'Find Youth'. Below the header, there's a section 'Show youth records where' with a text input field 'SACWIS ID# is equal to' containing the value 'ABCDEFG12'. A blue arrow points to the 'Display Report' button. A 'Cancel' button is also visible.

Then select the *Add a Meeting* button. You're now ready to enter meeting notes!

A screenshot of the YCPRT 'Find Youth' interface showing a table of youth records. The breadcrumb trail is 'Youth Reports' > 'Settings' > 'Find Youth'. Below the header, there's a search bar and filters for 'County', 'Name', 'SACWIS ID#', and 'DOB'. The table has columns for 'County', 'Last Name', 'DOB', and 'SACWIS ID#'. One record is visible: Allen Durphey, DOB 03-24-2010, SACWIS ID# *****12. A blue arrow points to the 'Add Meeting' button next to this record.

2. Introductions

The Facilitator sets the stage by welcoming and introducing everyone, explaining the purpose of the meeting and the setting meeting expectations. They also ask the youth how they are doing and what they'd like to talk about.

During this time, document all YCPRT team members who are in attendance.

Select the *Meeting Participants* tab.

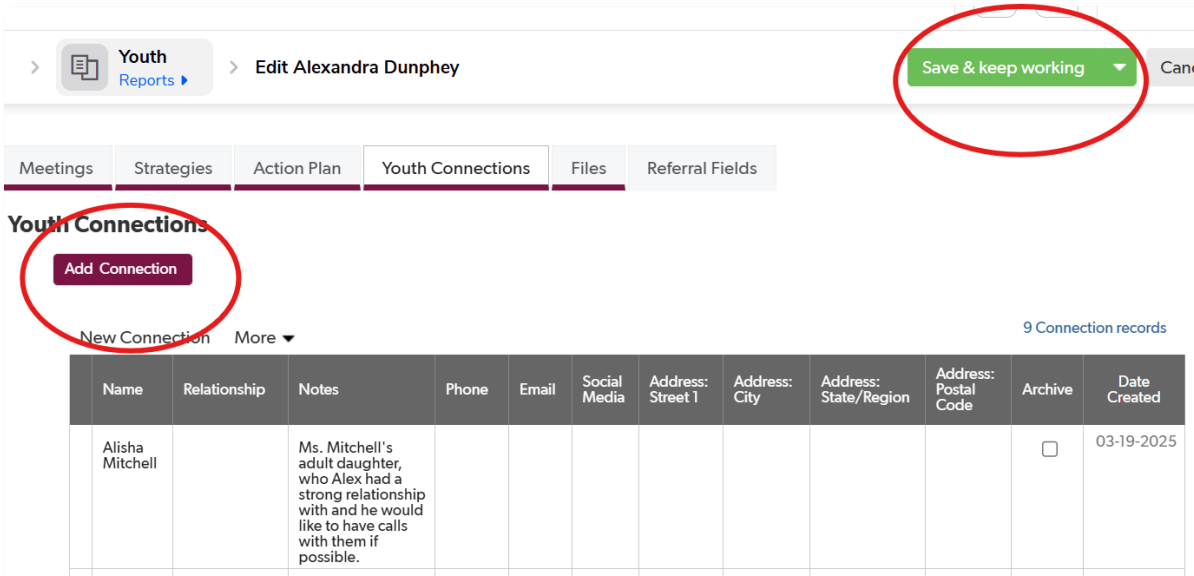
A screenshot of the YCPRT 'Edit Action Plan' interface. The breadcrumb trail is 'Meetings Reports' > 'Edit Action Plan for Alex_06-13-2025'. Below the header, there's a table with columns for 'SACWIS ID#', 'Meeting Date', 'Status', and 'Action'. The 'Meeting Participants' tab is selected and circled in red. Below the table, there's a section 'This Meeting's Action Items' with a table that has columns for 'Meeting Date', 'Strategy #', 'Action', 'Anticipated Barriers', 'Plan to Overcome Barriers', and 'Target Completion Date'. The text 'No Action Step records found' is displayed below the table.

Then list their names in the correct field.

Double click each field to enter the data.

A screenshot of the YCPRT 'Roundtable Participants' interface. The breadcrumb trail is 'Meetings Reports' > 'Action Plan for Alex_06-13-2025'. Below the header, there's a section 'Roundtable Participants' with the instruction 'Enter each roundtable role's name. There is an optional notes field.' Below this is a table with columns for 'Name' and 'Notes'. The table lists participants: Scribe (Cait Proctor-Frazier), Caseworker (Sarah Jean), External Consultant (Molly Black), Facilitator (Dave Mills), and Lead Practitioner (Bill Mead).

Next, access the *Youth Connections* tab and select the *Add Connection* button to enter the youth's support participants. **Note:** Throughout the meeting, it is important to select the *Save & keep working* button to make sure your updates are saved.

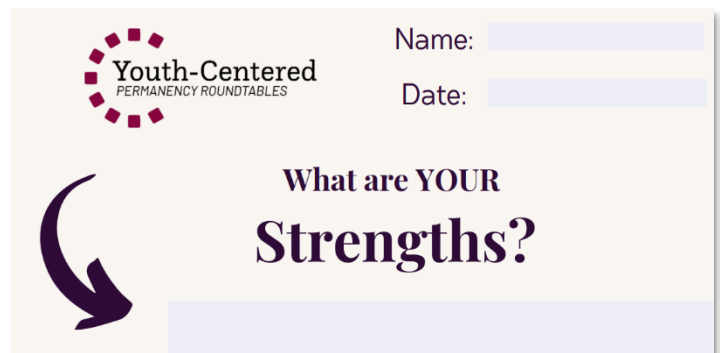


Name	Relationship	Notes	Phone	Email	Social Media	Address: Street 1	Address: City	Address: State/Region	Address: Postal Code	Archive	Date Created
Alisha Mitchell		Ms. Mitchell's adult daughter, who Alex had a strong relationship with and he would like to have calls with them if possible.								<input type="checkbox"/>	03-19-2025

After the supports have been added, enter the number of each type of support participant at the top of the *Meeting Participants* screen, including the bio family, kin, foster family, etc.

3. Strengths Bombardment

The next step is to document the strengths bombardment conversation. Share your screen with the YCPRT attendees and note the conversation details in the Strengths Bombardment document which was provided to you prior to the meeting. Document each strength and who shared it. **Note:** This step is only completed when the youth is present.



4. Update and Review Youth Connections

During the Roundtable discussion, the youth and team will review the youth's connections. Make the appropriate updates under the *Youth Connections* tab.

Youth Connections:

[Add Connection](#)

[New Connection](#) [More](#) ▼

9 Connection records

Name	Relationship	Notes	Phone	Email	Social Media	Address: Street 1	Address: City	Address: State/Region	Address: Postal Code	Archive	Date Created
Alisha Mitchell		Ms. Mitchell's adult daughter, who Alex had a strong relationship with and he would like to have calls with them if possible.								<input type="checkbox"/>	03-19-2025

Click the *Archive* button to the right of the record if the youth/team identifies a connection is no longer a support.

Tips:

- As you are documenting, be sure to ask for clarification and confirmation to ensure the notes are accurate.
- Share your screen to review youth connections, when possible.

5. Strategy and Action Plan Discussion

During the strategy and action plan discussion, go to the *Action Plan* tab and document new action items created during the meeting. Go to the *Notes* section to update notes from previous meetings. Click *Save & keep working* to view the newly created action items under the *All Open Action Items* section.

Home > Meetings > Reports > Edit Action Plan for_03-19-2025

[Save & close](#) [Cancel](#)

[Save & close](#)
[Save & next](#)
[Save & keep working](#)

▼ This Meeting's Action Items

Meeting Date	Strategy #	Action	Anticipated Barriers	Plan to Overcome Barriers	Target Completion	Person Responsible	Status	Notes/Updates	Include on Print
No Action Step records found									

▼ All Open Action Items

Open action items have a status of In Progress or On Hold. To add a new action item, click in the first blank cell and start typing.

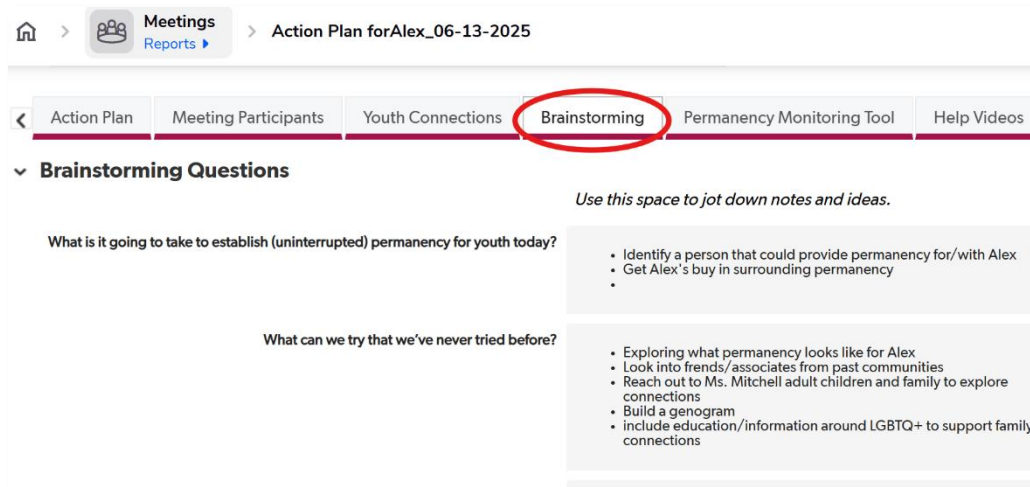
[New Action Step](#) [More](#) ▼

0 Action Step records

Tip: Be sure to enter notes from a lens that is non-judgmental, family focused, youth-centered, and trauma informed.

Additional step for the PRT

During the professionals-only Permanency Roundtable (PRT) meeting, the team will brainstorm creative permanency action ideas. Document these in the *Brainstorming* tab.



Home > Meetings > Reports > Action Plan for Alex_06-13-2025

← Action Plan Meeting Participants Youth Connections **Brainstorming** Permanency Monitoring Tool Help Videos

▼ **Brainstorming Questions**

Use this space to jot down notes and ideas.

What is it going to take to establish (uninterrupted) permanency for youth today?

- Identify a person that could provide permanency for/with Alex
- Get Alex's buy in surrounding permanency

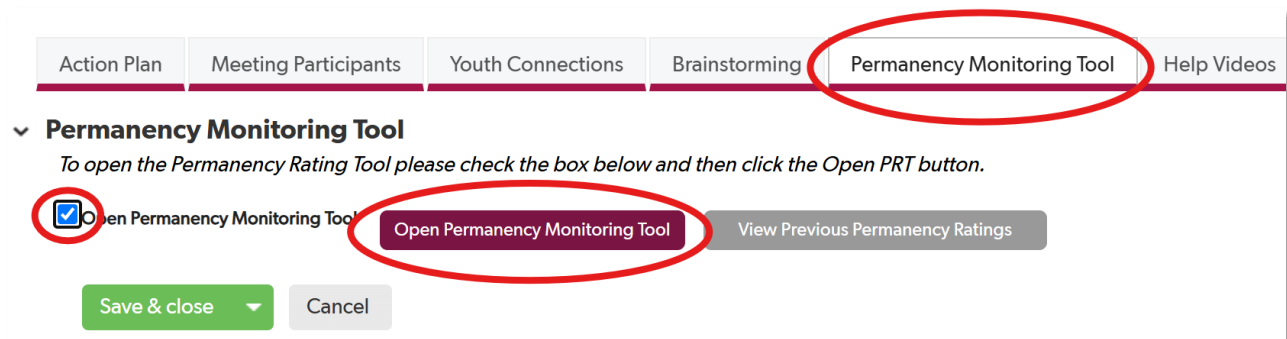
What can we try that we've never tried before?

- Exploring what permanency looks like for Alex
- Look into friends/associates from past communities
- Reach out to Ms. Mitchell adult children and family to explore connections
- Build a genogram
- Include education/information around LGBTQ+ to support family connections

6. Permanency Monitoring Tool

After discussing the action plan, scheduling the next meeting and wrap up, the youth and their supports will be excused from the meeting. The professional team will then complete the permanency monitoring tool. This tool is completed at every meeting but never with the supports or youth included in the discussion.

Go to the *Permanency Monitoring Tool* tab, select the *checkmark* next to Open Permanency Monitoring Tool, then click the *Open Permanency Monitoring Tool* button. Note the team's rating for each item.



Action Plan Meeting Participants Youth Connections Brainstorming **Permanency Monitoring Tool** Help Videos

▼ **Permanency Monitoring Tool**

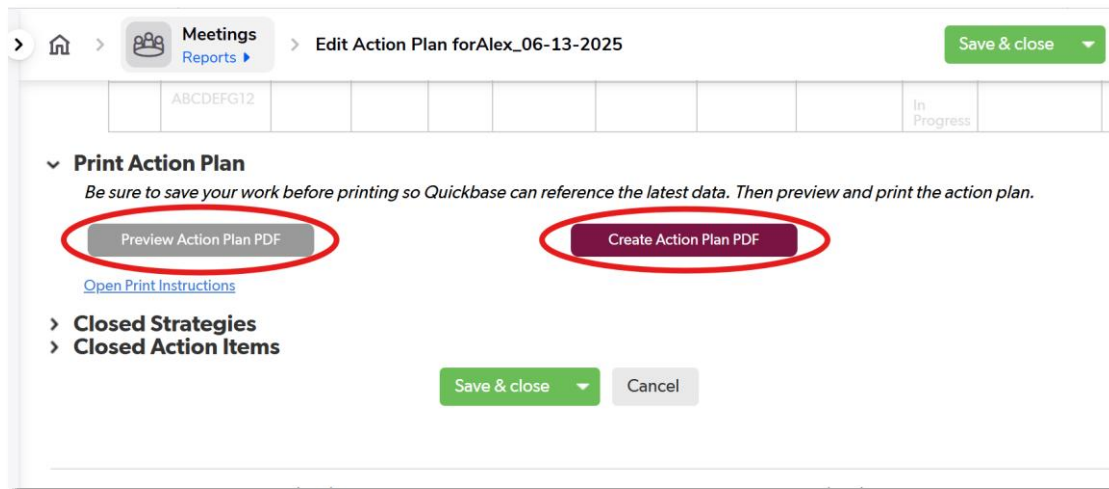
To open the Permanency Rating Tool please check the box below and then click the Open PRT button.

☒ Open Permanency Monitoring Tool **Open Permanency Monitoring Tool** View Previous Permanency Ratings

Save & close Cancel

7. Finalize Action Plan and Send to Team

Once the notes are finalized, click the *Preview Action Plan PDF* and review it for accuracy. Then click the *Create Action Plan PDF* button to create the PDF document. If possible, print a copy of the action plan and provide it to the youth at the end of the meeting. Email the Action Plan and Strengths Bombardment to the YCPRT team and the youth within 24 hours of the meeting.



Meetings Reports > Edit Action Plan for Alex_06-13-2025

Save & close

ABCEFG12 In Progress

▼ **Print Action Plan**
Be sure to save your work before printing so Quickbase can reference the latest data. Then preview and print the action plan.

Preview Action Plan PDF Create Action Plan PDF

[Open Print Instructions](#)

> Closed Strategies
> Closed Action Items

Save & close Cancel

Then provide the Strengths Bombardment document to the appropriate team member who will upload it into the electronic youth record.

8. Documenting in SACWIS

All meetings must be documented in SACWIS and include the following details:

- On the *Family Teams Meeting* tab, go to the *State Purpose of FTM* dropdown and select the meeting type. Note that selecting one of the PRT meeting values unlocks the other PRT relative values in the Family Team Meeting.
- Go to the *Child Details* screen and add the Legal and Relational Permanency Rating.
- On the *Meeting Outcomes* screen record results of the meeting.
- For PRT meetings, go to the **Attendees** screen to select additional roles.
- Then select the **Completed** button.
- The completed meeting now appears in the youth's case. It can also be copied for the next PRT meeting which carries over all the previous attendees so they do not need to be re-added for each meeting.