



OREGON YOUTH AUTHORITY
Policy Statement
Part III – Youth Services (Community)



Subject:

Developmental Case Management – Community

Section – Policy Number:

**C: Case Planning and Review –
1.0**

Supersedes:

**I-A-11.0 (07/12)
II-E-1.8 (12/04)**

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None

**Related
Standards
and
References:**

- [OAR 410-170-0070](#) (BRS Service Planning)
- [ORS 419C.486](#) (Consideration of recommendations of committing court; case planning)
- [ORS 420A.125](#) (Adjudicated youth; intake assessments; reformation plan; placement)
- [ORS 182.515–182.525](#) (Evidence-based programs)
- [OYA Developmental Case Management Manual](#)
- [OYA RNA 2.0 Full Assessment document](#)
- [Healthy Youth Development \(HYD\) Full Assessment Guide](#)
- [OYA Case Documentation Standards](#)
- [OYA policies](#): II-E-1.8 Developmental Case Management – Facility
- III-B-2.0 New Commitments to OYA Legal Custody
- III-B-4.0 Youth Rights and Grievances in the Community
- III-C- 3.0 Youth Assessment for Sex Offense Risk and Protective Factors – Community
- III-D-1.3 JPPO Contact Standards
- III-D-3.3 Substance Use Screening Youth – Community
- OYA forms: [YA 7011 Field Supervisor Transition Criteria Tool](#) QA
- OYA JJIS forms: YA 1820 (Youth Transition Plan)
YSP 1820 (Youth Transition Plan) Spanish
YA 3013-J (Case Plan Summary)

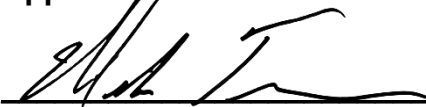
**Related
Procedures:**

- [Initial Progress Review checklist](#)
- [Intake Progress Review checklist](#)
- [Transition Progress Review checklist](#)
- [Quarterly Progress Review checklist](#)

Policy Owner:

Development Services Assistant
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Approved:


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I. PURPOSE:

This policy provides OYA staff standards for a developmental case management process, including assessing a youth's needs, developing an individual case plan, progress review meetings and transition planning for youth who are on OYA parole or probation.

II. POLICY DEFINITIONS:

Case plan: A written plan that is tailored to the youth's unique requirements as identified by their initial assessment. A case plan assists staff in managing cases and setting goals; and documenting goals, interventions, and youth's progress. A case plan constitutes and fulfills the requirements of the Reformation Plan as defined in ORS 420A.005, 420A.125, and 420A.010 and is created and maintained in the statewide Juvenile Justice Information System (JJIS).

Community Placement: A youth's placement in a community-based setting, including substitute care, OYA foster care, residing with a parent, guardian, or other approved caregiver, or living independently that supports a youth's supervision, treatment, and transition needs.

Healthy Youth Development (HYD) Assessment: A structured framework that measures and supports a youth's growth in skills linked to psychosocial maturity, positive development, and transition readiness. HYD is designed to guide individualized planning, track development over time, and ensure that youth are building the skills needed for safe and successful reintegration into the community.

Initial Service Plan (ISP): A personalized, developmentally appropriate plan that outlines targeted interventions to address identified behaviors and needs and guides service delivery during the first 45 days in a BRS placement, until the Master Service Plan is developed.

Juvenile parole/probation officer (JPPO): The OYA [primary] case manager who works with a youth, the youth's family, and the community while the youth is in OYA custody.

Juvenile Justice Information System (JJIS): An electronic information system developed and maintained by the state through OYA and administered in partnership with county juvenile departments.

Master Service Plan (MSP): A personalized, developmentally appropriate plan that outlines measurable goals, interventions, and services to address identified behaviors and needs and guides ongoing service delivery, progress monitoring, and transition planning beyond the first 45 days in a BRS placement

OYA Risk and Needs Assessment (RNA): A broad survey of youth strengths and needs that's primary purpose is to assess the youth's current strengths and needs and guide planning and intervention toward reducing their needs and maintaining or enhancing their strengths.

Placement representative: An adult who works or lives in the youth's placement when a youth is placed outside of their home. Depending on where the youth is placed, these representatives are generally close-custody facility living unit case coordinators, camp counselors, residential treatment providers/counselors, foster parents, or foster care certifiers.

Progress review: Structured checkpoints where the Progress Review Team reviews a youth's progress, assesses the effectiveness of the case plan, and informs next steps in services, placement, and transition planning.

Progress Review Team (PRT): A diverse team responsible for reviewing progress, maintaining shared understanding of a youth's case plan, and supporting informed, documented case management and transition readiness decisions. Core members include the youth, the youth's family members or caregivers (as appropriate), the assigned JPPO, placement representative, primary treatment provider, tribal representative (for youth enrolled in one of Oregon's federally recognized tribes) **The PRT replaces the multidisciplinary team (MDT).**

III. POLICY:

OYA's objective is to protect the public by ensuring youth accountability, promoting change, developing/improving skills, and reducing the likelihood that youth will commit more crime. For OYA to engage in effective case management, all activities, such as assessment, progress review meetings, case plan development, and decision-making must be equitable, inclusive, trauma-informed, and developmental.

OYA has identified diversity, equity, and inclusion as an agency priority and initiative, with a goal to build a respectful, diverse, equitable, and inclusive environment for youth and staff that is free from harassment, discrimination, and bias. Data shows youth of color and LGBTQ+ youth are disproportionately represented in the juvenile justice system. While OYA is only one part of that system, it plays a critical role in addressing the historical and systemic inequities it perpetuates.

Individuals responsible for conducting assessments or making case management decisions must be trained to recognize and address personal biases. They must understand how such biases can affect decision-making and take deliberate steps to prevent their negative impact when assessing youth, determining treatment options, or making case management decisions.

Case planning in the community follows the same core principles as OYA secure facility case planning, but the process is adapted to reflect the JPPO's role as the primary case manager and the involvement of community providers.

Unlike facility-based case planning, the community model does not include use of the Transition Criteria Tool. Instead, the JPPO completes this work through assessment review, collaboration, and structured discussion prior to and during MSP meetings or other case planning meetings.

Providing supports and services is a core component of the case management process and is essential to helping youth build the skills, behaviors, and accountability needed to make progress toward their case plan goals and transition criteria. Supports and services are intentionally selected and coordinated to address the youth's identified case plan priority areas and to support progress toward safe transition to less restrictive placements.

IV. GENERAL STANDARDS:

- A. All case management practices for OYA youth must be grounded in the following core topics: youth-centered practices, balancing accountability and support, strengths-based approaches, individualized planning, skill-building and supports, family and community engagement, transition-focused planning, equitable and inclusive practices, and trauma-informed care.
- B. JPPOs (primary case managers) must apply these topics consistently in the development and implementation of case plans, in the coordination of services, and in all decisions related to the supervision, care, and transition of youth as listed below.
 - 1. Be youth-centered by considering developmental stages and how they influence youth behavior, decision-making, and responses to interventions.
 - 2. Balance accountability and support by holding youth accountable in fair, proportional, and age-appropriate ways, while also providing the resources, guidance, and opportunities needed to change. Consequences must be meaningful but not purely punitive, paired with supports that foster growth.
 - 3. Be strengths-based by building on each youth's existing talents, skills, and positive supports rather than focusing solely on deficits.
 - 4. Conduct individualized planning by tailoring case plans to each youth's developmental needs, educational goals, mental health, and family/community circumstances.
 - 5. Support skill-building by ensuring youth receive opportunities for practicing pro-social behaviors, learning decision-making skills, and developing competencies.
 - 6. Be equitable and inclusive by ensuring that services, opportunities, and case management practices are accessible and responsive to all youth, addressing disparities and promoting fairness across race, culture, gender identity, ability, and background.
 - 7. Be trauma-informed by recognizing the prevalence and impact of trauma in youth's lives, avoid practices that may retraumatize, and incorporate strategies that promote healing, resilience, and safety.
- C. OYA Developmental Case Management Manual and Case Documentation Standards

Standards for case management and case documentation are detailed in the OYA Developmental Case Management Manual and Case Documentation Standards. Staff involved in the case management or case documentation process must follow the standards listed in the documents.

D. OYA Case Management Process

OYA's case management process outlines how staff work together to support youth from intake through transition. It is an ongoing process that includes regular review and adjustment as youth progress and circumstances change. Each part of the process builds on the previous one and helps ensure that planning and decisions are consistent across placements.

The OYA case management process is comprised of the five core components listed below.

1. **Assessment:** Assessments help identify a youth's strengths, needs, risks, and readiness. This information guides case planning and decision-making throughout the youth's involvement with OYA.
2. **Developing a Case Plan:** Case planning uses assessment information to identify priority areas, outline expectations, and establish goals that support progress and transition readiness.
3. **Providing Services and Supports:** Services and supports are delivered to address case plan priority areas and support skill development. These may include education, treatment, skill-building programs, and other interventions aligned with the case plan.
4. **Monitoring Progress:** Progress monitoring focuses on understanding how the youth is doing over time, including engagement in services, skill development, and movement toward transition criteria and goals. Information gathered during this step is used to determine whether the case plan remains appropriate or needs adjustment.
5. **Transition Planning:** Transition planning prepares youth for movement to less restrictive placements by identifying needed supports, services, and expectations for the next phase.

E. Assessments

The identification of youth needs, strengths, individual experiences, and developmental factors is the foundation of case plan development. OYA uses assessments, including the Risk/Needs Assessment (RNA 2.0) and the Healthy Youth Development (HYD) assessment, to guide this process.

1. In addition to these case planning assessments, Progress Review Teams (PRTs) must review and consider other relevant assessment information as applicable. This may include educational, vocational, medical, psychological, substance use, and other specialized assessments.

Refer to the OYA Developmental Case Management Manual; OYA RNA 2.0 Full Assessment document; or the HYD Full Assessment Guide for more information regarding assessments.

2. OYA Risk/Needs Assessment (RNA 2.0)

a) Initial assessment

- (1) The JPPO must complete the RNA 2.0 assessment within 45 days of a youth's commitment to OYA or prior to the MSP meeting, whichever comes first, for youth in community placements.
- (2) The JPPO must have completed related RNA OYA training courses and be familiar the RNA assessment structure, questions, and question help. The RNA 2.0 Full Assessment document may be referred to for further information.
- (3) Before the RNA 2.0 is completed, the JPPO must review all available documentation, consult collateral contacts, and meet with the youth to ensure an understanding of the youth's behavior, functioning, strengths, and challenges across settings.
- (4) The JPPO must answer most questions by using information about the youth's behavior, functioning, and experiences during the previous 90 days. A 90-day timeframe must be applied unless an item specifies long-term or historical patterns.

b) Reassessment

- (1) The JPPO must complete and lock a reassessment on each youth at least once every 90 days and prior to the scheduled Progress Review.
- (2) The JJPO must use the "Build and Base On" feature in JJIS for reassessment.
- (3) The JPPO must review every item from the prior assessment and update responses and notes based on current information, so the reassessment accurately reflects the youth's current functioning, strengths, and needs.

3. Healthy Youth Development (HYD) Assessment

a) Initial Assessment

- (1) The JPPO must complete the HYD assessment prior to the Initial Progress Review or within 45 days of a youth's commitment to OYA probation, or prior to the MSP meeting, whichever comes first, when youth are in community placements.

- (2) The JPPO must have completed related HYD OYA training courses and be familiar with the HYD assessment's structure, skills, question prompts, and scoring. The HYD User Guide may be used to clarify item scoring before completing an assessment.
- (3) Before meeting with the youth, JPPOs must review all relevant documentation, including case notes, JJIS records, incident reports, school updates, treatment information, and past HYD assessments.

b) Reassessment

- (1) The JPPO must complete a HYD reassessment every 90 days or prior to scheduled Progress Reviews, as it serves as a core component of case planning, goal setting, and assessing transition readiness, when youth are in community placements.
- (2) All reassessments must be completed using the "Build and Base On" feature in JJIS, checking for changes and updating any notes under each question.
- (3) JPPOs must review every item from the prior assessment and update responses and notes based on current information, so the assessment accurately reflects the youth's current functioning, strengths, and needs.

4. Additional Assessments

- a) JPPOs must ensure completion of any additional assessments the youth may need or that are required by OYA policy (e.g., PROFESOR, mental health, alcohol and drug, fire offense related, etc.).
- b) The JPPO must facilitate the completion of needed assessment by community partners and record the information in JJIS. The JPPO must ensure treatment providers have necessary assessment information to provide adequate treatment and intervention.
- c) See OYA policy III-B-2.0 (New Commitments to OYA Legal Custody) for guidelines in gathering and documenting information for youth ordered by the court to OYA legal custody.

F. Developing a Plan

Throughout the case management process, the PRT regularly returns to the core steps to review information, assess progress, and make informed adjustments to planning and services.

Additional guidance for this process is provided in the OYA Developmental Case Management Manual.

Note: Documentation of the reviews in the JJIS Case Plan refers to multidisciplinary team reviews (MDT). References to the MDT in this policy is for JJIS documentation reasons only.

1. The JPPO retains responsibility for case plan oversight and must ensure that:
 - a) Services and supports align with case plan priority areas;
 - b) Progress, behavior, and engagement demonstrate movement toward transition criteria; and
 - c) Expectations remain aligned with supervision requirements and public safety considerations.
2. The JPPO must not duplicate the provider MSP or treatment plan but must ensure that all services and interventions support transition readiness and align with case plan priorities.
3. Family participation is a priority, and scheduling practices must follow expectations outlined in OYA policy I-A-9.0 Parent/Guardian and Family Involvement in Youth Reformation.
4. During all Progress Reviews the JPPO must:
 - a) Actively engage in case planning discussions;
 - b) Provide constructive feedback, and acknowledge progress;
 - c) Communicate clear expectations as appropriate;
 - d) Provide the youth with opportunities to ask questions;
 - e) Encourage the youth's active participation in their case plan or MSP; and
 - f) Ensure a collaborative process, including encouraging the youth, family, and other participants to share insights, ask questions, and engage in the review.
5. Intake/Initial Service Plan Meeting (MDT)

The Intake/Initial Service Plan (ISP) meeting occurs at the beginning of a youth's placement in each residential or proctor-based program. It focuses on orientation, setting expectations, and establishing a clear, immediate plan to address the youth's needs while assessments are underway. The meeting also lays the foundation for ongoing case planning by identifying next steps and preparing the team and youth for future Progress Reviews.

- a) The JPPO, in coordination with the youth's placement representative, must ensure an Intake/ISP meeting is held at the start of the youth's placement and occurs the day of admission.
- b) During the Intake/ISP meeting, the PRT is established and must include the youth, family, JPPO, placement representative, and other relevant individuals identified and approved by the JPPO.
- c) The JPPO must participate in the Intake/ISP meeting as required by OYA policy III-D-1.3 JPPO Contact Standards policy.
- d) During the Intake/ISP meeting, the JPPO must ensure the following tasks are completed:
 - (1) Confirm the program has received all required documentation, including the commitment order, parole or probation conditions, medical card, BRS authorization documents and RNA and HYD assessments (if completed);
 - (2) Ensure required intake documentation is reviewed and signed, as applicable;
 - (3) Provide a copy of the RNA and HYD assessments, if completed, to the PRT;
 - (4) Discuss anticipated discharge planning considerations, including likely placement type and transition needs;
 - (5) Identify approved contacts and potential overnight visit resources; and
 - (6) Share any additional information needed for the program to complete the ISP.
- e) If the JPPO is not present at the time of intake, they must ensure that all tasks listed above are completed prior to the youth's arrival at the placement.

6. Documentation and Case Plan

Following the Intake/ISP Meeting, the JPPO must complete the following tasks in JJIS:

- a) Open the OYA Community Case Plan phase;
- b) Document a summary of the meeting in JJIS under the Case Plan domain;
- c) Record the Intake Progress Review, including participants and key information discussed; and
- d) Document the scheduled date of the next Progress Review, including the Initial/MSP meeting.

Long-term goals are not established at this stage of the case planning process

7. Initial Progress Review (MDT)

The Initial Progress Review, also known as the Master Service Plan (MSP) meeting in residential and proctor-based programs, is the first formal case planning meeting. Its purpose is to establish or confirm the youth's case plan and next steps.

Timing of the Initial Progress Review varies based on the youth's placement.

- a) Residential or proctor-based programs: The JPPO must coordinate with the placement representative to ensure the Initial Progress Review (MSP) is held within 45 days of admission.
- b) From OYA close custody to foster care, living at home, or living independently: The JPPO must ensure the Initial Progress Review occurs at the time of placement and serves as the first formal case planning meeting.
- c) New commitments placed directly in OYA foster care or at home: The JPPO must ensure the Initial Progress Review is held within 45 days of admission.

8. During the Initial Progress Review

The Initial Progress Review/MSP meeting is the first formal case planning meeting. It focuses on establishing or confirming the youth's case plan or MSP, depending on placement, and supporting progress toward the identified transition goals.

During the Initial Progress Review/MSP meeting, the JPPO must ensure the following tasks are completed:

- a) Review of progress (current functioning, completion of activities, successes, etc.);
- b) Assessment (including RNA and HYD) and information sharing;
- c) Case plan and MSP development;
- d) Expectations, feedback, and engagement;
- e) Transition planning and next steps; and
- f) Placement-specific considerations.

9. Transition Readiness Domain and Transition Criteria Selection

Transition criteria aligns with assessment information, including the RNA, HYD, and other relevant sources, and reflects the individualized needs, strengths, and risks of the youth. The Transition Readiness Domain must be opened in the OYA Community Case Plan for all youth residing in the community.

The JPPO must:

- a) Retrieve and add the long-term goal associated with the OYA Transition Readiness Domain for community youth;
- b) Enter the identified transition criteria based on the assessment process and decisions made during the Initial Progress Review;
- c) Ensure the selected criteria reflect what the youth must demonstrate to support a safe and successful transition to a lower level of supervision.

10. Short-term Goals and Interventions

The JPPO must document short-term goals and interventions based on the youth's placement.

- a) Residential or proctor-care based programs: Short-term goals and interventions are addressed through the provider's MSP or treatment plan and do not need to be duplicated in the case plan.
- b) Foster care, living at home, or living independently: The JPPO must develop and document short-term goals and interventions in the OYA Community Case Plan in collaboration with the youth and PRT.

11. Documentation and Case Plan

Within seven business days of the Initial Progress Review, the JPPO must complete all documentation in JJIS to reflect the outcomes of the meeting and support ongoing case management.

The JPPO must complete the below items.

- a) Enter transition criteria, short-term goals, and interventions, if applicable, into the OYA Community Case Plan within seven business days of the Initial Progress Review.
- b) Document information in the JJIS Case Plan as described in the OYA Developmental Case Management Manual.
- c) Build the Case Plan Summary (YA 3013-J), save a copy to the youth's JJIS file, and ensure distribution as follows:
 - (1) Residential or proctor-based programs: Coordinate with the placement representative to ensure the youth receives a copy of their MSP; or
 - (2) Foster care, living at home, or living independently: Provide a copy of the Case Plan Summary to the youth and parent/guardian within 30 days of the review. This may occur at the next in-person check-in.
- d) Place a note in JJIS reflecting that the youth received a copy of the case plan summary.

G. Providing Supports and Services

The JPPO must coordinate, and monitor supports and services to ensure alignment with case plan priority areas, transition criteria, and supervision expectations.

H. Monitoring Progress

Monitoring youth progress is an ongoing process used to assess youth functioning over time and to determine the continued appropriateness of goals, supports, services, and expectations. This process links observed behavior, engagement, and skill development to the youth's MSP or case plan priorities and established transition criteria.

1. Monitoring activities must include monthly check-ins, ongoing communication between the JPPO, program staff, and the youth, and structured progress reviews to ensure the case plan remains responsive, developmentally appropriate, and aligned with transition readiness.

2. The JPPO must use information obtained through progress monitoring to reinforce expectations, document progress, identify barriers, and implement timely adjustments to plans and supports.

3. Monthly Check-Ins

Monthly in-person contacts are the primary method for supporting and reinforcing treatment, developmental goals, and youth progress. These contacts are intended to reinforce the case plan/MSP by identifying progress toward short- and long-term goals, supporting behavior change, and monitoring compliance with probation conditions.

- a) The JPPO must have a face-to-face check-in with each youth on their caseload at least once every 30 days, in accordance with OYA policy III-D-1.3 JPPO Contact Standards.

- b) The JPPO must initiate and schedule with the residential provider before the monthly check-in.

Families and other participants are not required to attend monthly check-ins, as these are not progress reviews.

- c) Face-to-face check-ins are the expectation; however, available technology may be used when in-person meetings are not feasible and with supervisor approval.

- d) The JPPO must review the following topics during the check-in:

- (1) Progress toward short-term goals and transition criteria;
- (2) Expectations related to accountability, behavior, and engagement;
- (3) Barriers impacting progress;
- (4) Next steps or areas needing additional support; and
- (5) Encourage the youth's engagement in their case plan or MSP.

- e) The JPPO must maintain required monthly contact with the youth's family, residential or proctor care program, and proctor or foster parents, in accordance with OYA policy III-D-1.3 JPPO Contact Standards.

- f) The JPPO must document each check-in in a JJIS note, including the type of contact, participants, a summary of the discussion (case plan need/goal discussed, progress,

concerns, and next steps), and any exceptions to required contact standards.

I. Quarterly Progress Review (MDT)

The Quarterly Progress Review is used to monitor progress over time, reinforce expectations, and ensure that the case plan/MSP remains current, responsive, and aligned with the youth's needs and transition readiness. This meeting builds upon prior Progress Reviews and focuses on understanding progress, identifying barriers and making informed adjustments to services, supports, and expectations.

1. The Quarterly Progress Review must be held at least every 90 days following the Initial Progress Review.
 - a) In residential or proctor-based programs, this review must align with the MSP update process.
 - b) Additional Progress Reviews may be held sooner, depending on the type of program, if new information emerges or if changes in the youth's circumstances require review.
2. The JPPO must ensure the Quarterly Progress Review addresses the following topics (as described in the OYA Developmental Case Management Manual):
 - a) Assessment (RNA, HYD, etc.) and information sharing;
 - b) Review of progress (current functioning, completion of activities, successes, etc.); and
 - c) Case plan and MSP development.
3. During the Progress Review

The JPPO must:

 - a) Share any updated assessment information (RNA, HYD, etc.);
 - b) Review each transition criterion within the Transition Readiness domain and discuss progress, supporting evidence, and whether the criterion has been met;
 - c) Review expectations, services, and supports and discuss any needed updates based on reassessment findings and team discussion;
 - d) Review short-term goals, close out goals as appropriate, and discuss new goals based on the youth's placement; and
 - e) Ensure the next Progress Review is scheduled.

4. Short-term Goals and Interventions

- a) In residential or proctor-based programs, updates to goals and interventions are addressed through the provider's MSP or treatment plan and do not need to be duplicated in the OYA Case Plan.
- b) Foster care, living at home, or living independently: The JPPO must update and document short-term goals and interventions in the OYA Community Case Plan based on reassessment findings and team discussion.

5. Documentation and Case Plan

Providers may conduct progress reviews more frequently than every 90 days based on youth needs, program requirements, or provider practices. Within seven days of each progress review, the JPPO must complete documentation in JJIS to reflect the outcomes of the meeting and support ongoing case management, as indicated below.

- a) Document progress, supporting evidence, and whether each transition criterion has been met within the Transition Readiness domain.
- b) Document a summary of the meeting in the Case Plan Review, including participants, key information discussed, and decisions made.
- c) Document the scheduling of the next progress review.
- d) Update the OYA Community Case Plan to reflect any changes to expectations, services, or supports identified during the meeting.
- e) Build the Case Plan Summary (YA 3013-J), save a copy to the youth's JJIS file, and ensure distribution as follows:
 - (1) Residential programs: Youth receives a copy of their MSP; or
 - (2) All other locations or living independently: Youth and parent/guardian receive a copy of the Case Plan Summary within 10 days of the review. This may occur at the next in-person check-in and must be documented in a JJIS note. Any exceptions to the 10-day due date must be approved by a field supervisor.

J. Unscheduled Progress Reviews (MDT)

1. Unscheduled Progress Reviews are conducted in response to significant events (e.g., youth runs away or returns to a program from a run, implementation of a behavioral contract, a temporary placement).
2. The purpose of an Unscheduled Progress Review is to clarify expectations, assess and adjust short-term goals, and introduce interventions as appropriate to address the youth's individual circumstances.
3. The JPPO must ensure the youth clearly understands any updates to expectations, short-term goals, or new interventions in the following areas:
 - a) Behavior;
 - b) Education and vocation;
 - c) Skill development and treatment;
 - d) Family engagement and support; and
 - e) Other areas, as applicable.

K. Transition Planning

1. The transition planning process begins preparing the youth for a safe and successful movement to a less restrictive placement. The process must focus on identifying goals, aligning services and supervision plans, and identifying expectations to support a successful transition.
2. The JPPO may begin discussing transition planning with the youth during monthly check-ins; however, transition readiness decisions are determined by the PRT.
3. Transition Plan by Placement
 - a) Residential or proctor-based programs: When a placement provider is contractually required to complete a transition plan, the JPPO must coordinate with the assigned placement representative to ensure the plan is completed at least 30 days prior to the planned transition date. When no such requirement exists, the JPPO must complete the Youth Transition Plan (Form YA1820) prior to the youth's transition date.
 - b) Foster care, transitioning home or to living independently: The JPPO must complete the Youth Transition Plan (Form YA 1820) prior to the youth's transition date.

- c) The JPPO must use the below listed categories and naming convention when importing the case plan into JJIS.
 - (1) Category: Case management.
 - (2) Subcategory: General case plan.
 - (3) Name: Transition plan.
- 4. The JPPO must follow the transition planning process and documentation standards outlined in the OYA Developmental Case Management Manual.
- 5. Transition Plan Completion - From an OYA secure facility or from foster care to home or to living independently
 - a) The JPPO must monitor the Youth Transition Plan and ensure all selected checklist items are completed, and a note is entered in JJIS within 30 days of the youth's parole date.
 - b) The JJIS note must include:
 - a) Category: Transition;
 - b) Subcategory: Transition Activities and Checklist Completion; and
 - c) A progress update on the youth and confirm that all transition activities and checklist items have been completed.
- 6. Transition Progress Review (MDT)

The Transition Progress Review ensures youth have a structured, developmentally appropriate plan for moving to a less restrictive environment. It evaluates progress on case plan and MSP goals, identifies areas for additional support or skill development, and supports clear communication among the youth, family, JPPO, and program staff.

 - a) The Transition Progress Review must be held prior to the youth's transition to a new placement.
 - b) Youth in residential or proctor-based programs: The JPPO must coordinate with the assigned placement representative, to ensure a Transition Progress Review is scheduled after the transition decision is made and prior to the youth leaving the placement.
 - c) Youth transitioning to foster care, living at home, or living independently: The JPPO must ensure a Transition Progress

Review occurs prior to the youth leaving the placement and at least 45 days before the anticipated transition date.

- d) Staff may refer to the OYA Developmental Case Management Manual for more information.

7. During the Transition Progress Review

The JPPO must ensure the following topics are addressed:

- a) Assessment (RNA, HYD, etc.) and information sharing;
- b) Review of progress (current functioning, completion of activities, successes, etc.);
- c) Transition planning and expectations;
- d) Services and support coordination; and
- e) Feedback and engagement.

8. Documentation and Case Plan

- a) Within seven business days of the Transition Progress Review, the JPPO must complete documentation and case planning updates in JJIS to reflect the outcomes of the meeting and support transition planning.
- b) The JPPO must complete a Youth Transition Plan and enter it into JJIS prior to the youth's transition from OYA foster care to independent living or home.
- c) The JPPO must:
 - (1) Document a summary of the meeting in the Case Plan Review, including participants, key information discussed, and decisions made;
 - (2) Document the scheduling of any follow-up contacts or meetings, as applicable;
 - (3) Review each transition criterion within the Transition Readiness domain and document progress, supporting evidence, and whether the criterion has been met;
 - (4) Update the OYA Community Case Plan to reflect transition expectations, services, and supports; and
 - (5) Incorporate transition expectations into the youth's parole and probation agreement, as applicable.

L. Progress Review Decision Making

PRT members must engage in respectful discussion that supports meaningful participation while balancing youth development with risk mitigation and community safety.

1. The core PRT is responsible for a youth's case planning and case management decisions and must strive to reach consensus. Consensus is achieved when team members understand and support the decision, even if full agreement is not reached.
2. If consensus cannot be reached, a field supervisor who is not a member of the PRT or program manager, and, if needed, the Community Services chief of parole/probation or assistant director must make the final decision.
3. If a family member on the PRT disagrees with a decision or recommendation and the issue is not resolved through team discussion, the PRT must notify them that they may contact the field supervisor or program manager for a resolution.
 - a) The field supervisor/program manager must review the issue and coordinate with the PRT, as needed, to ensure the family member's concern is fully considered.
 - b) If a concern involves potential abuse, neglect, or a violation of rights, a PRT member must report the issue to the Professional Standards Office. Responses to allegations of abuse must also follow OYA policy 0-2.3 Mandatory Reporting of Abuse.

The PRT must notify the family member that they may file a complaint with PSO directly by calling the Reporting Line at 1-800-315-5440, or completing an [online complaint form](#). The family member may also file a grievance on behalf of the youth in accordance with OAR 416-020.
 - c) The PRT must notify youth who disagree with a decision or recommendation that they may file a youth grievance in accordance with OYA policy III-B-4.0 Youth Rights and Grievances in the Community.

M. Distribution of the Case Plan

Following the Initial Progress Review and each Quarterly Progress Review, the JPPO must generate the OYA Facility Case Plan summary, and print and review the document with the youth.

1. Youth must have access to review their Progress Summary upon request.

2. Staff must ensure the Progress Summary is stored and reviewed in a manner that protects confidentiality and prevents access by other youth or unauthorized individuals.

N. Quality Assurance for Case Management

Quality assurance ensures that case management is implemented consistently, documentation meets established standards, decision-making is supported by available assessment information, and youth receive equitable, developmentally appropriate case planning. Quality assurance reviews support coaching, consistency, and continuous improvement and are separate from employee performance evaluations.

1. Case-Level Quality Assurance

- a) Transition Criteria Tool Review: Field supervisors must review each completed Transition Criteria Tool prior to the Initial Progress Review using form YA 7011.
- b) The review must verify that the selected transition placement and criteria are consistent with OYA policy and case management standards while also being data-informed through timely assessment information.

2. Statewide Quality Management

Development Services administration must establish and maintain a statewide case management quality management system that:

- a) Monitors implementation fidelity;
- b) Analyzes statewide trends;
- c) Identifies strengths and opportunities for improvement;
- d) Informs coaching and technical assistance;
- e) Supports policy and process improvements;
- f) Recommends training priorities; and
- g) Reports findings to agency leadership.

3. Continuous Improvement

Quality assurance findings must be reviewed regularly and used to improve practice, documentation standards, staff training, coaching, policy development, and implementation support throughout the agency.

V. LOCAL OPERATING PROTOCOL REQUIRED: NO.