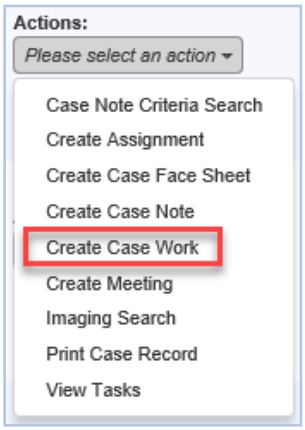
Family Case Plan

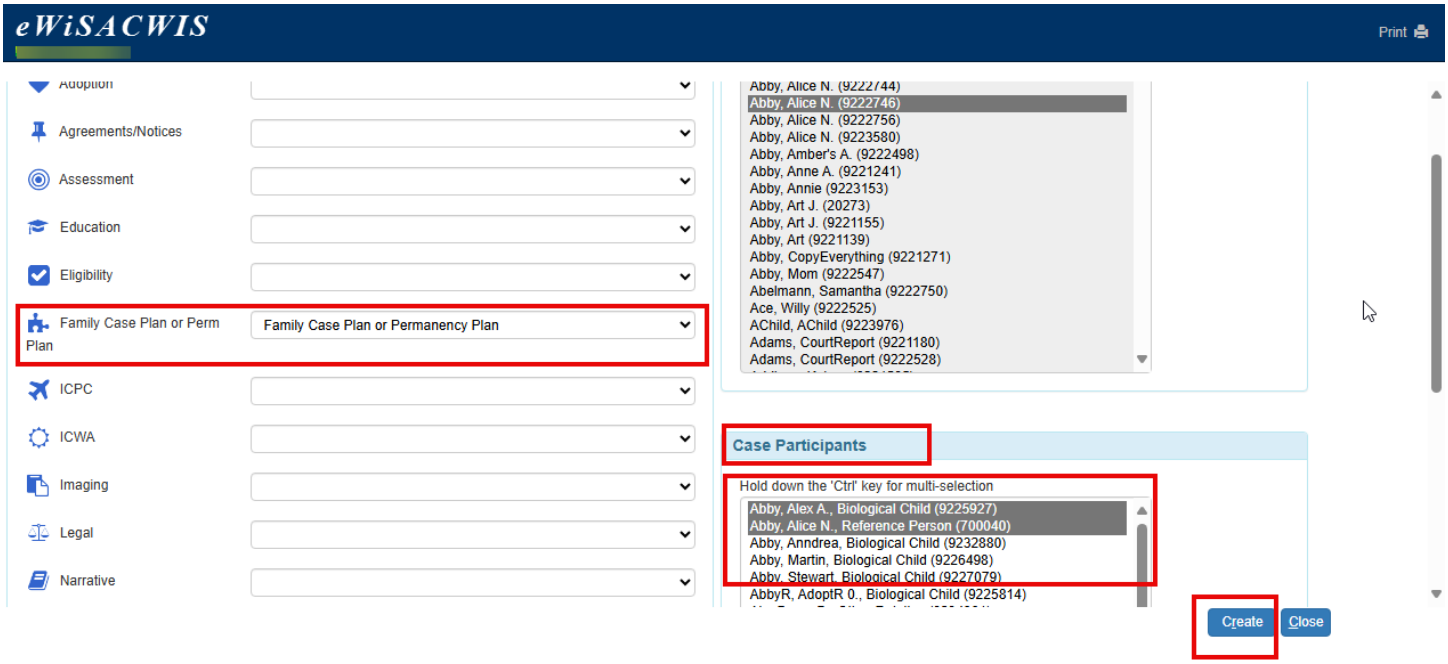


Note: To create a Family Case Plan, an assignment to the case is needed. Security is needed to create a Family Case Plan.

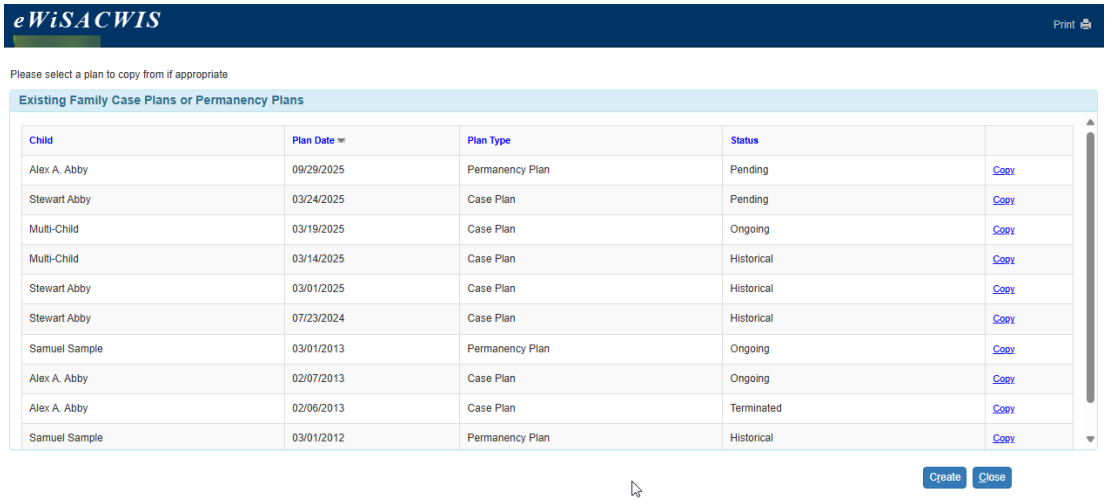
1. From the desktop, go to the Cases tab and click the Create Case Work hyperlink Create case work or select Create Case Work from the Actions drop-down next to the specific case to open the Create Case Work page.

2. On the Create Case Work page, select Family Case Plan or Permanency Plan from the Family Case Plan/Perm Plan icon. Select the Case and the Case Participant(s). Then click Create.

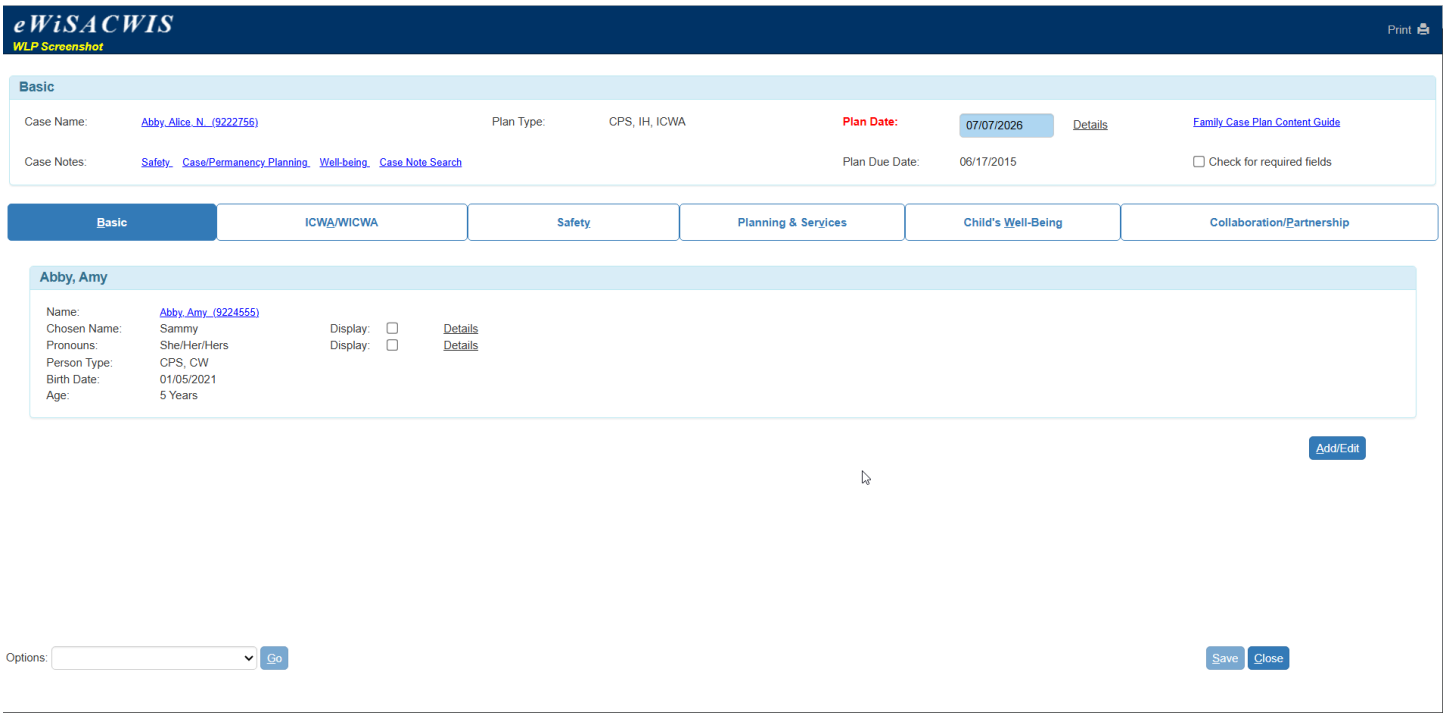
Note: A Case Plan can be created for multiple children. Hold down the 'Ctrl' key for multi-selection on the Create Case Work page. Alternatively, additional children/youth can be added to the Case Plan on the Family Case/Permanency Plan page.



Note: A Person Type must be documented on Person Management to create a Family Case Plan. See the Person Management User Guide for more information. If a Family Case Plan or Permanency Plan already exists, the Family Case/Permanency Plan Creation page will appear. Click the Copy hyperlink to copy a previously created Family Case Plan. Otherwise, click the Create button to create a new Family Case Plan.



3. On the Family Case/Permanency Plan page, a date will pre-fill in the Plan Date field based on when the next plan is due. When copied over, the Plan Date will determine what type of plan displays, based on the child's/youth's Person Type(s).



Note: Having a future date on the plan brings in any additional applicable information (Services; Education; Medical/Mental Health; Safety Assessment, Analysis and Plan; and CANS) each time the plan is opened. It is recommended to enter the estimated approval date as the Plan date. If the date is changed, the Family Case Plan "refreshes" and the child welfare professional could lose plan content, even if content has been previously saved. A pop-up message will alert the child welfare professional if they want to change the date after the Family Case Plan has been created to avoid losing saved documentation.

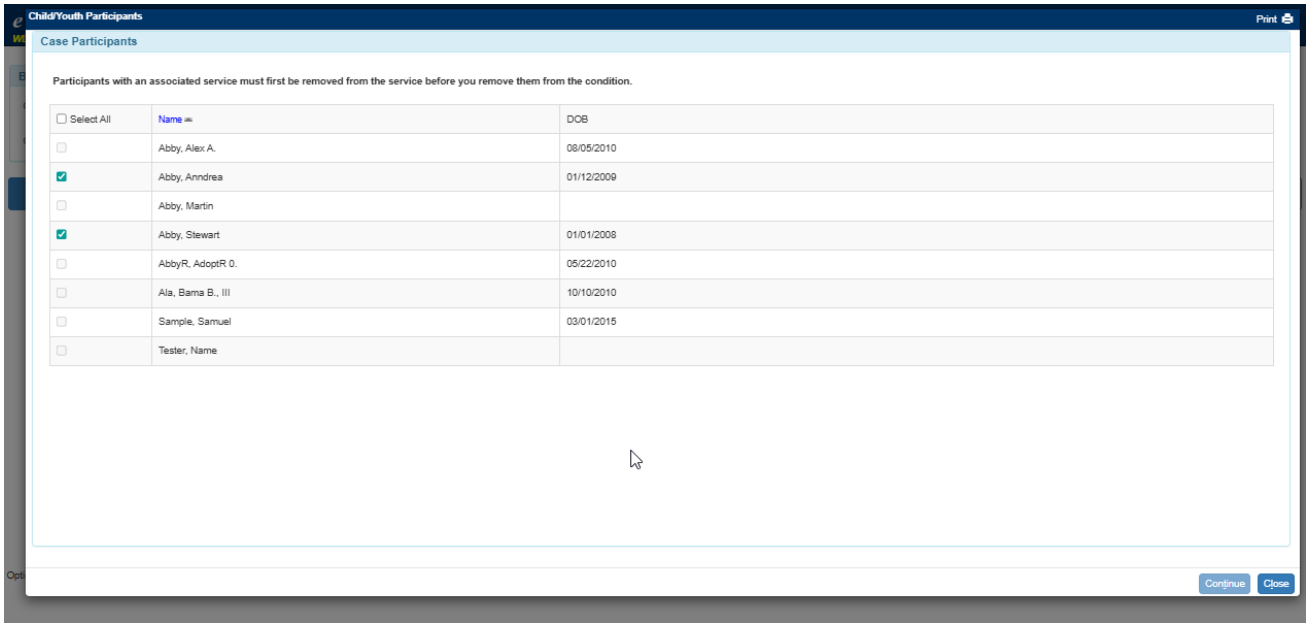
Note: On the Case Plan, in the Basic group box, added a hyperlink that reads "Family Case Plan Content Guide". The link appears at all times, even after Approval and when accessed via Search.

4. The first tab is the Basic tab. The Basic tab displays the name of the child/youth as a section with the name displayed as a hyperlink. Selecting this hyperlink will open the Person Management page to edit the child's/youth's information.

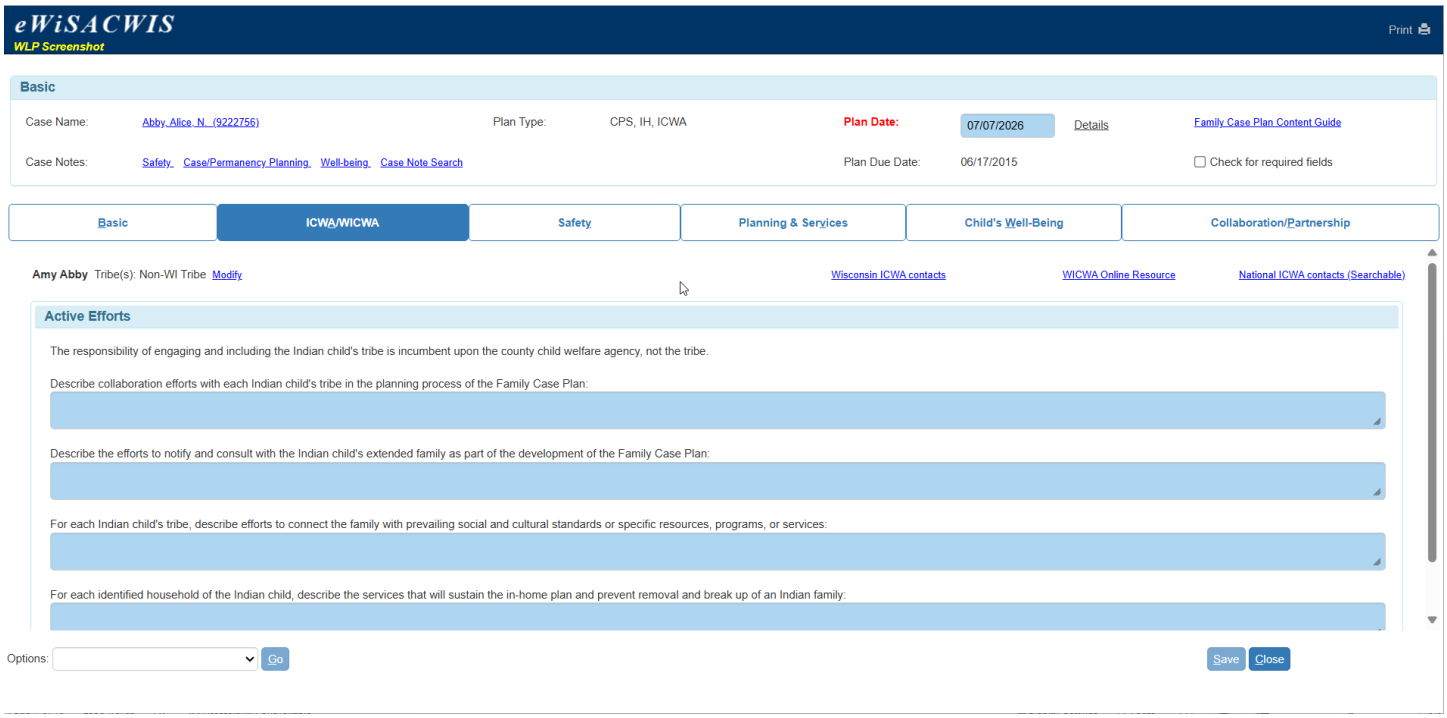
5. To add additional children/youth to this plan, click the Add/Edit button on the lower right corner of the page. This will open the Child/Youth Participants page.

6. On the Child/Youth Participants page, select the appropriate checkboxes to add or remove children/youth on the plan. Click Continue to return to the Case/Permanency Plan page. Any child/youth under 24 and not in Out-of-Home Care will be able to be selected.

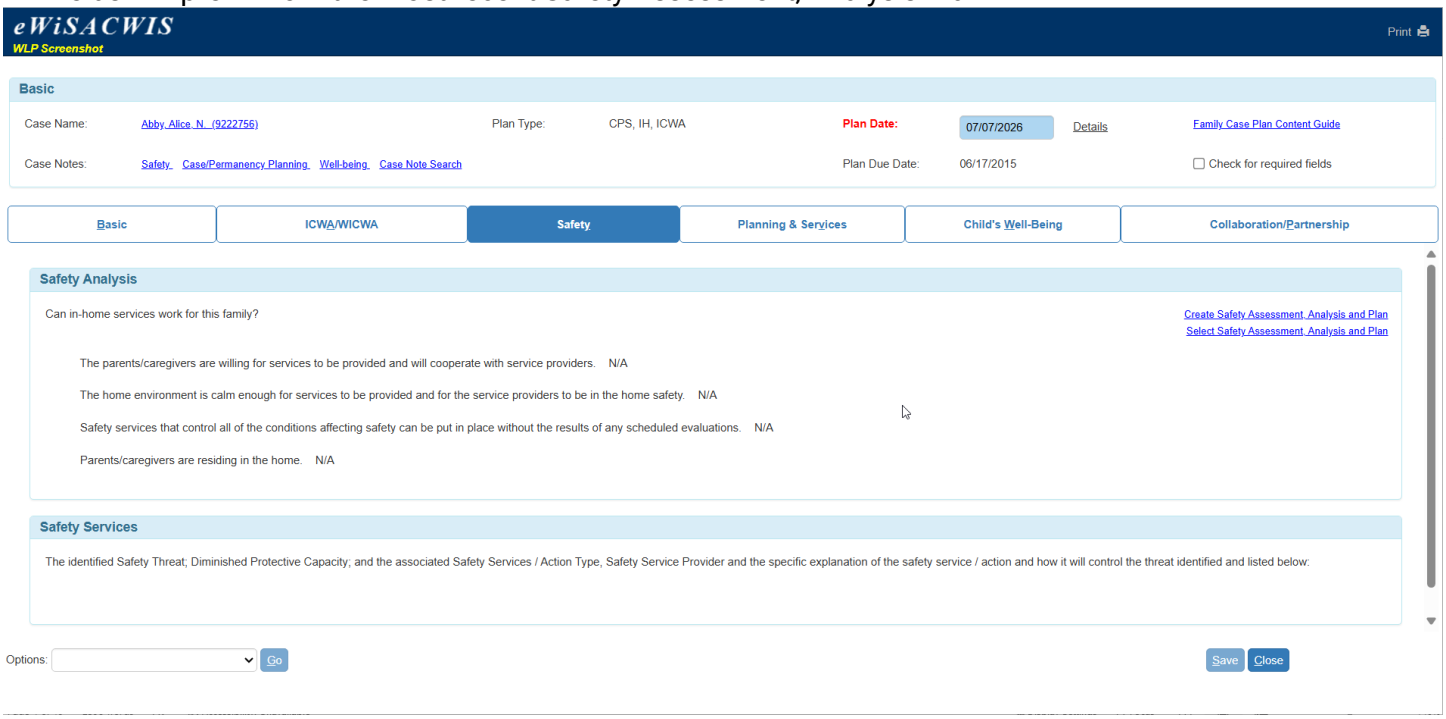
Note: Select the Case Notes: hyperlinks to search Structured Case Notes. See the Creating and Viewing Case Notes/Structured Case Notes User guide for more information



7. The ICWA/WICWA tab appears when any child/youth on the Basic tab is ICWA eligible. One or more children/youth has Tribal Identification status as 'Member', Pending' or 'Eligible for a membership, not a member' on their Person Management record. The name of each child/youth that has Tribal Identification status is displayed along with their Indian Tribe list value with a Modify link that launches the child's Person Management page in Edit mode. If a child/youth is associated with more than one Tribe, the Tribe names will be listed, separated by commas.
8. If the Family Case Plan type is YJ only, each person listed on the Basic tab needs to have their Youth Justice work evaluated. The ICWA/WICWA tab is displayed only when certain YJ case boxes are not completed and specific referral offenses (938.13(4),938.13(6),938.13(6m), or 938.13(7)) are listed. If these conditions are not met, the ICWA/WICWA tab remains hidden.
9. Wisconsin ICWA contacts, WICWA Online Resource and National ICWA contacts (Searchable) Hyperlinks were included on the ICWA/WICWA tab that launches contacts to the tribes.



10. The Safety tab appears if there are safety concerns on the Safety Assessment, Analysis and Plan. Several fields will prefill from the most recent Safety Assessment, Analysis Plan.

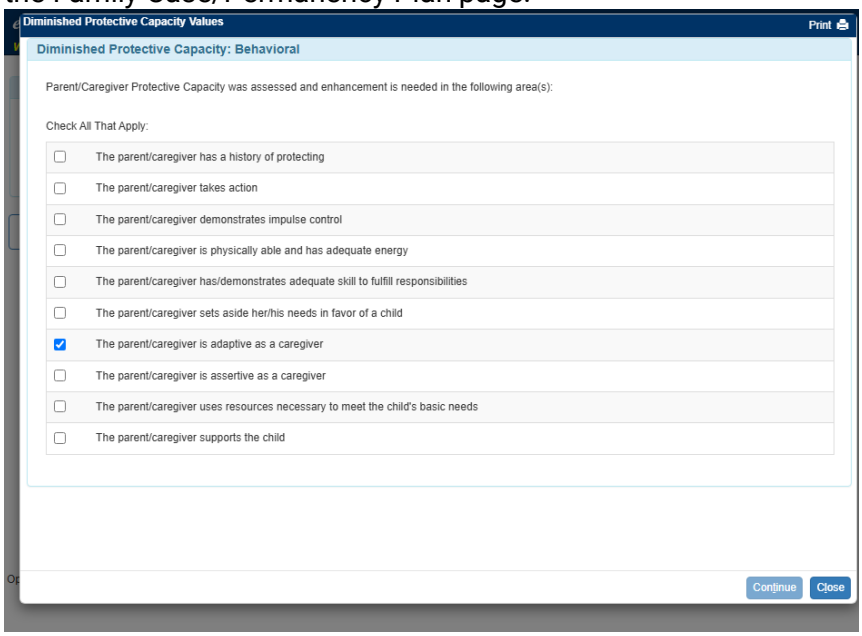


11. The 'Create Safety Assessment, Analysis and Plan' link displays on the Case Plan when there are no other Safety Assessment, Analysis and Plans that are 'Pending' on the Case. From this tab, select the Create Safety Assessment, Analysis and Plan hyperlink to create a Safety Assessment, Analysis Plan. The link is hidden when the Case has any 'Pending' SAAP.

Note: When the Person Type is CPS, there must be an associated Safety Assessment, Analysis Plan in order to approve the Family Case Plan.

12. The information and narrative below will only appear when there is an In-Home Safety Plan.
    a. Safety Service / Action Type: *Pre-fills from SAAP*
    b. Safety Service Provider: *Pre-fills from SAAP*
    c. Type of Diminished Protective Capacity: Select from the drop-down menu the type of diminished protective capacity (Behavioral, Cognitive, or Emotional). This will automatically launch the Diminished Protective Capacity Values page.
    d. The Values hyperlink can be used to return to the Diminished Protective Capacity Values page. On the Diminished Protective Capacity Values page, select all applicable values. Click 'Continue' to return to the Family Case Plan page.

13. On the Diminished Protective Capacity Values page, select all applicable values. Click Continue to return to the Family Case/Permanency Plan page.

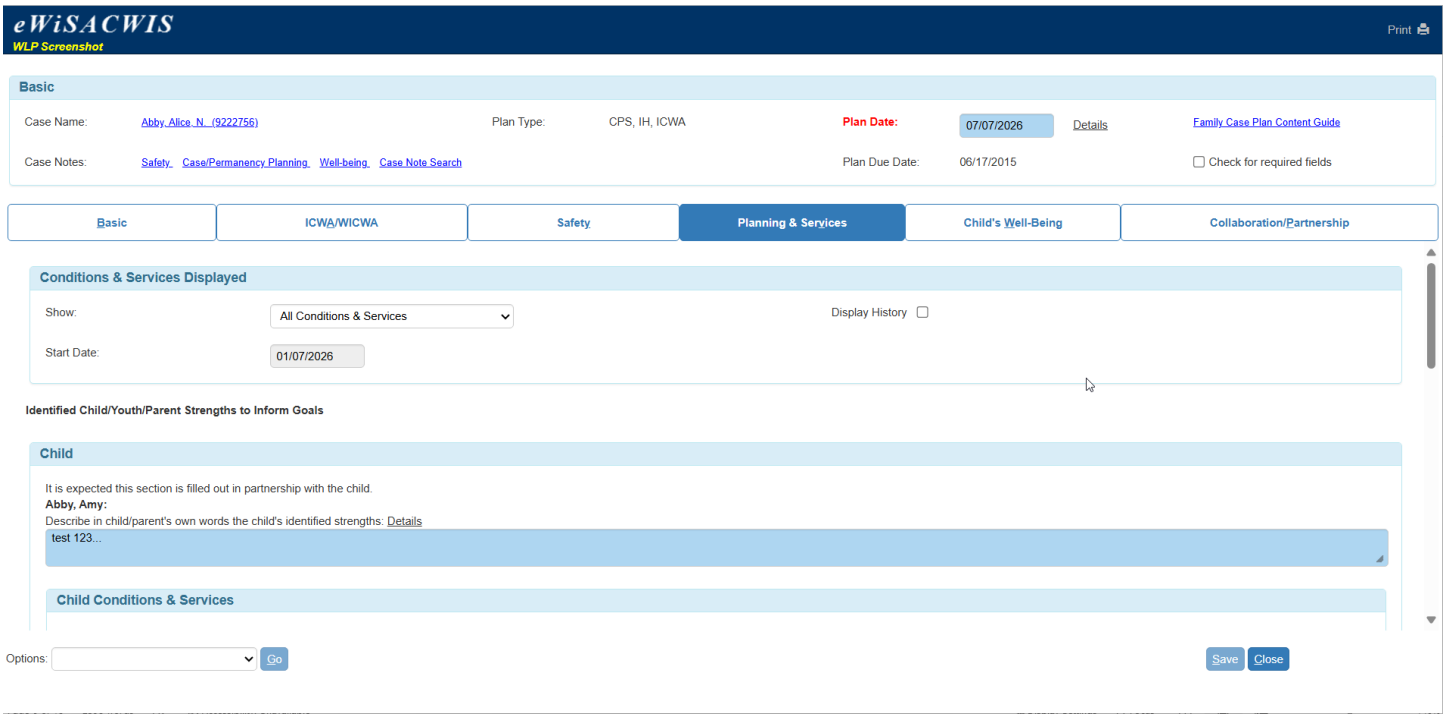


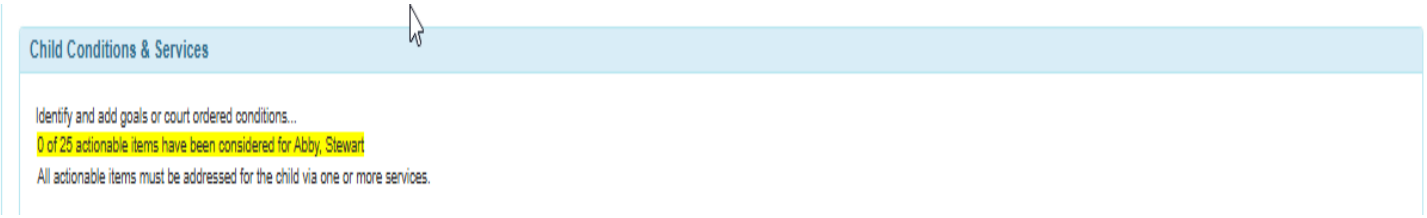
14. Document the Demonstrated Behavioral Change needed for safe case closure.

15. The next tab is the Planning & Services tab. This tab displays Conditions and Services which were provided in the last 6 months or will be provided in the next 6 months. The 'Show' drop-down in the Conditions & Services Displayed section can be used to filter which Conditions & Services display on the page. Also checking the Display History Checkbox will display Conditions and Services that have ended over 6 months ago.

    Click **Insert** in the Child Conditions & Services section to add child/youth Conditions and Services. This will open the Conditions and Services page. Click Import to copy goals and/or services from a historical Family Case Plan. This will open the Conditions and Services Summary page. See step 32 on page 14 for the import feature.

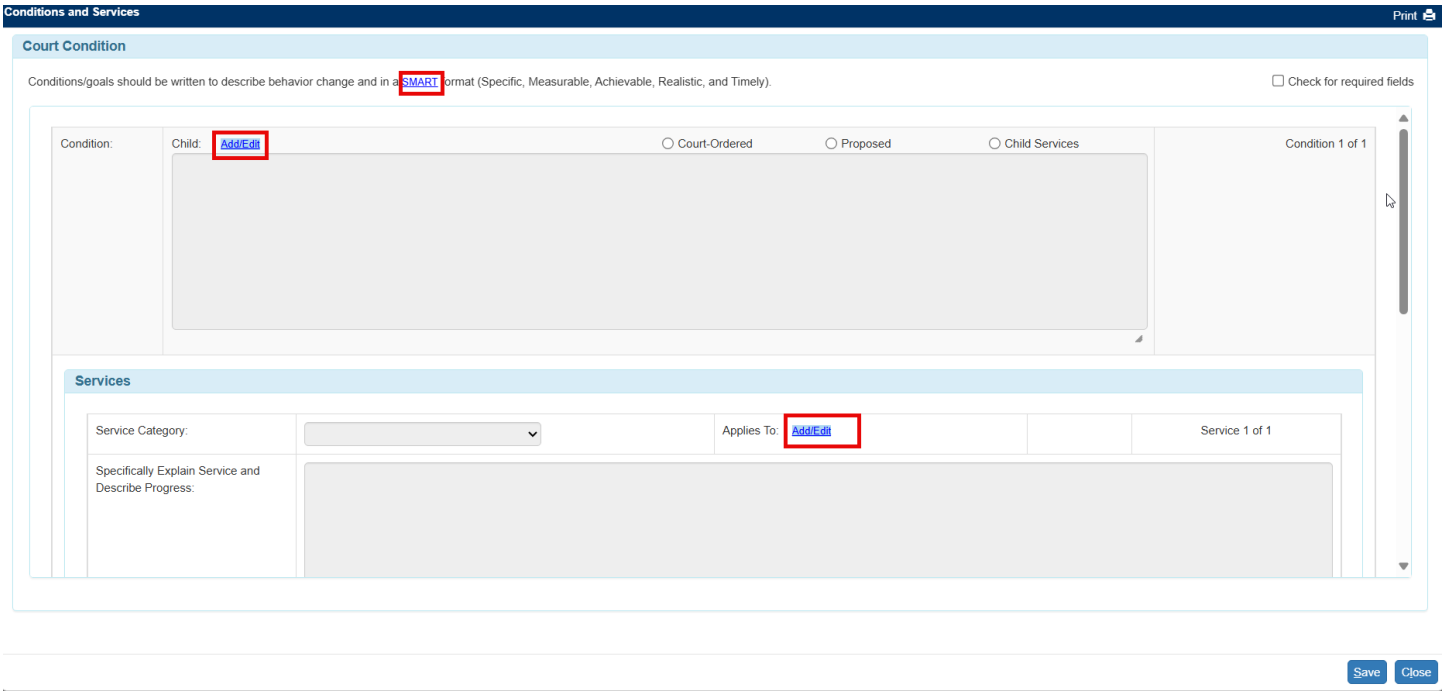
Note: If a CANS was completed for this child/youth, the actionable items will display on the Family Case Plan. The text highlighted in yellow below displays where on the Family Case Plan the number of actionable items from CANS appear.


eWiSACWIS
WLP Screenshot
Print
Basic
Case Name: Abby, Alice, N. (9222756)
Plan Type: CPS, IH, ICWA
Plan Date: 07/07/2026
Details
Family Case Plan Content Guide
Case Notes: Safety Case/Permanency Planning Well-being Case Note Search
Plan Due Date: 06/17/2015
Check for required fields
Basic
ICWA/WICWA
Safety
Planning & Services
Child's Well-Being
Collaboration/Partnership
Conditions & Services Displayed
Show: All Conditions & Services
Display History
Start Date: 01/07/2026
Identified Child/Youth/Parent Strengths to Inform Goals
Child
It is expected this section is filled out in partnership with the child.
Abby, Amy:
Describe in child/parent's own words the child's identified strengths: Details
test 123...
Child Conditions & Services
Options:
Go
Save
Close

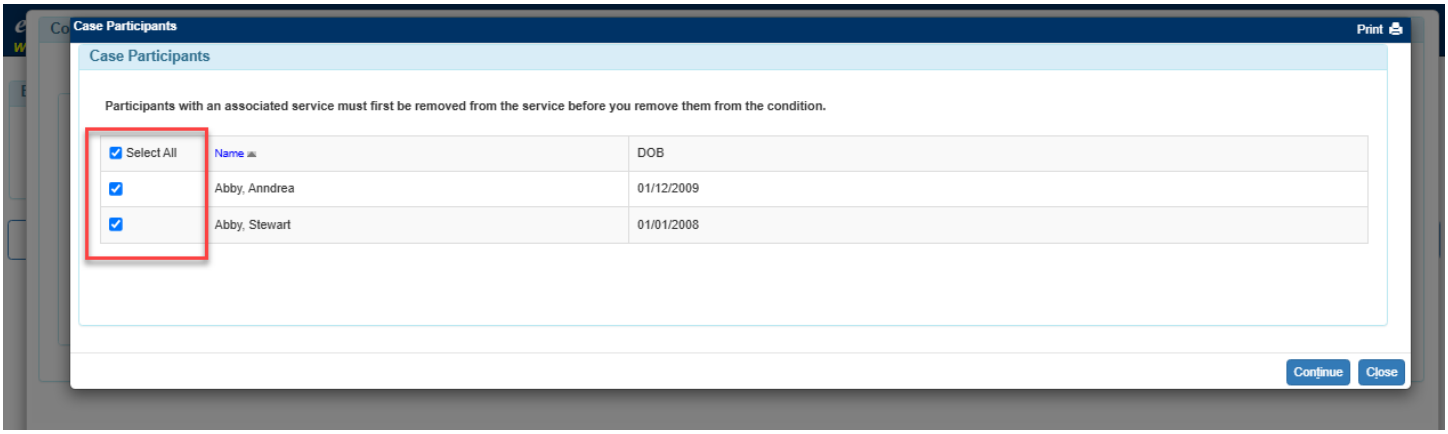

Child Conditions & Services
Identify and add goals or court ordered conditions...
0 of 25 actionable items have been considered for Abby, Stewart
All actionable items must be addressed for the child via one or more services.

16. On the Conditions and Services page (accessed via the Insert button on the Planning & Services tab of the Family Case/Permanency Plan page), click the Add/Edit button to add the associated child(ren)/youth. Multiple children/youth can be added per Condition, if the same Condition applies.

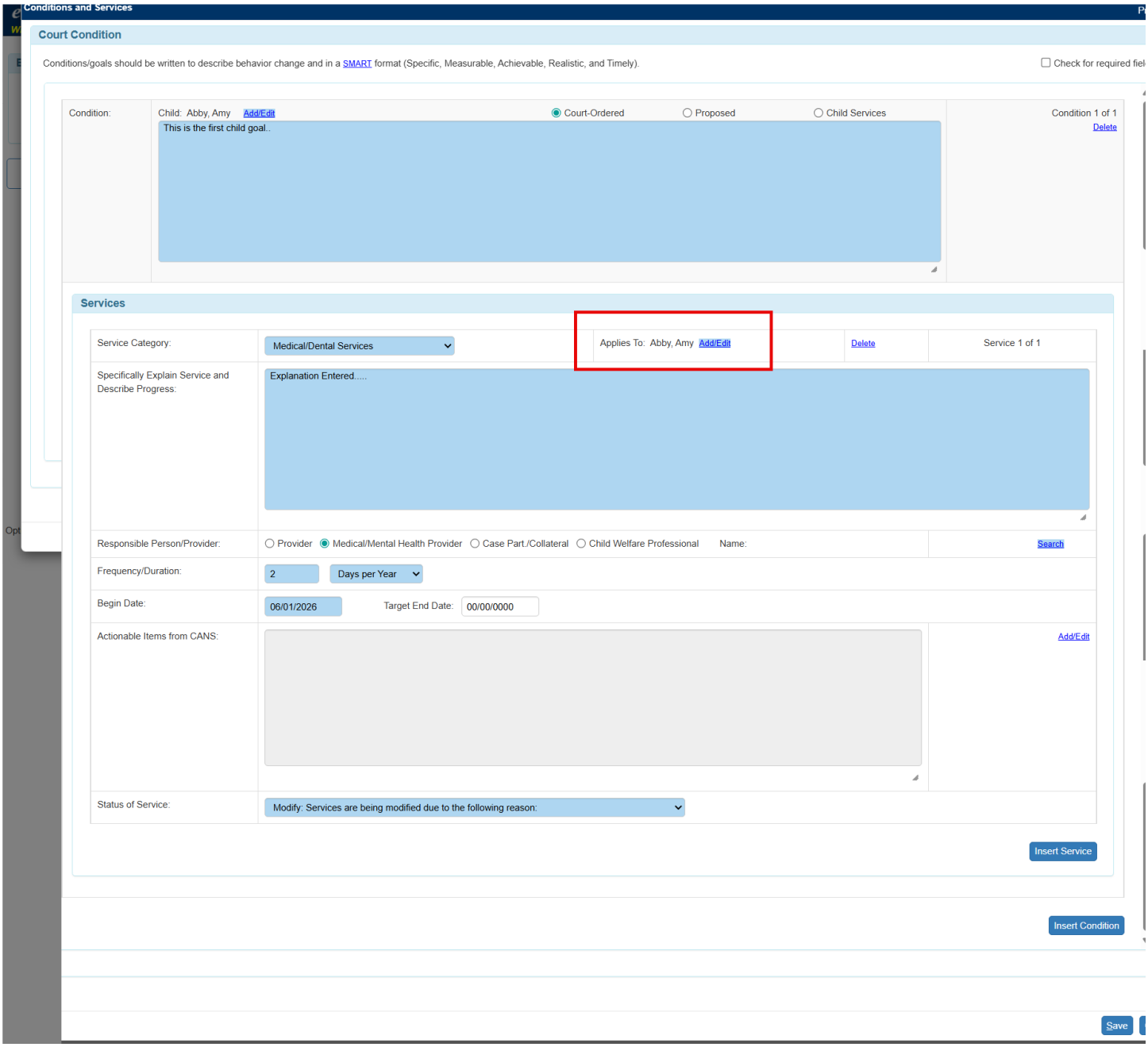
Note: Complete the Condition/Service details using the SMART framework (Specific, Measurable, Actionable, Realistic, and Timebound) when documenting goals for the Family Case Plan or Permanency Plan.



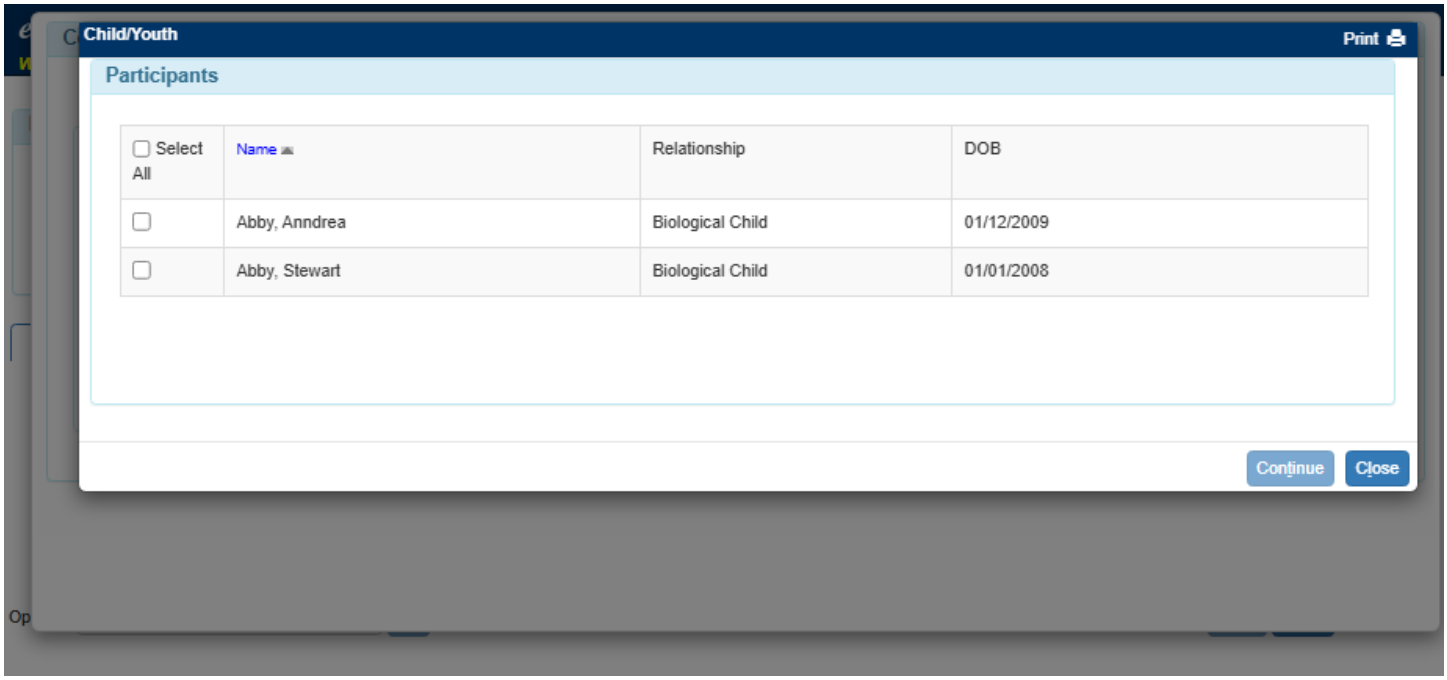
17. On the Case Participants page, select the applicable child(ren)/youth and click Continue.



18. Select the radio button that is appropriate for the Condition being entered. Court-Ordered, Proposed, or Child/Youth Services. Once one of these are selected the remainder of the page can be entered.
19. Back on the Conditions and Services page, enter the Condition. In the Services section, select the Service Category and explain the service. In the Responsible Person/Provider section, select the Provider, Medical/Mental Health Provider, Case Participant/Collateral or Worker radio button. Then click the Search hyperlink and search for the appropriate responsible person/provider. Enter the Frequency/Duration and Begin Date. If applicable, document the End Date. Describe the progress, select the status of the service, and document the description of the service. Click the Insert Service or Insert Goal buttons to add additional services or goals to this condition/objective. Click Save and Close to return to the Family Case/Permanency Plan page.

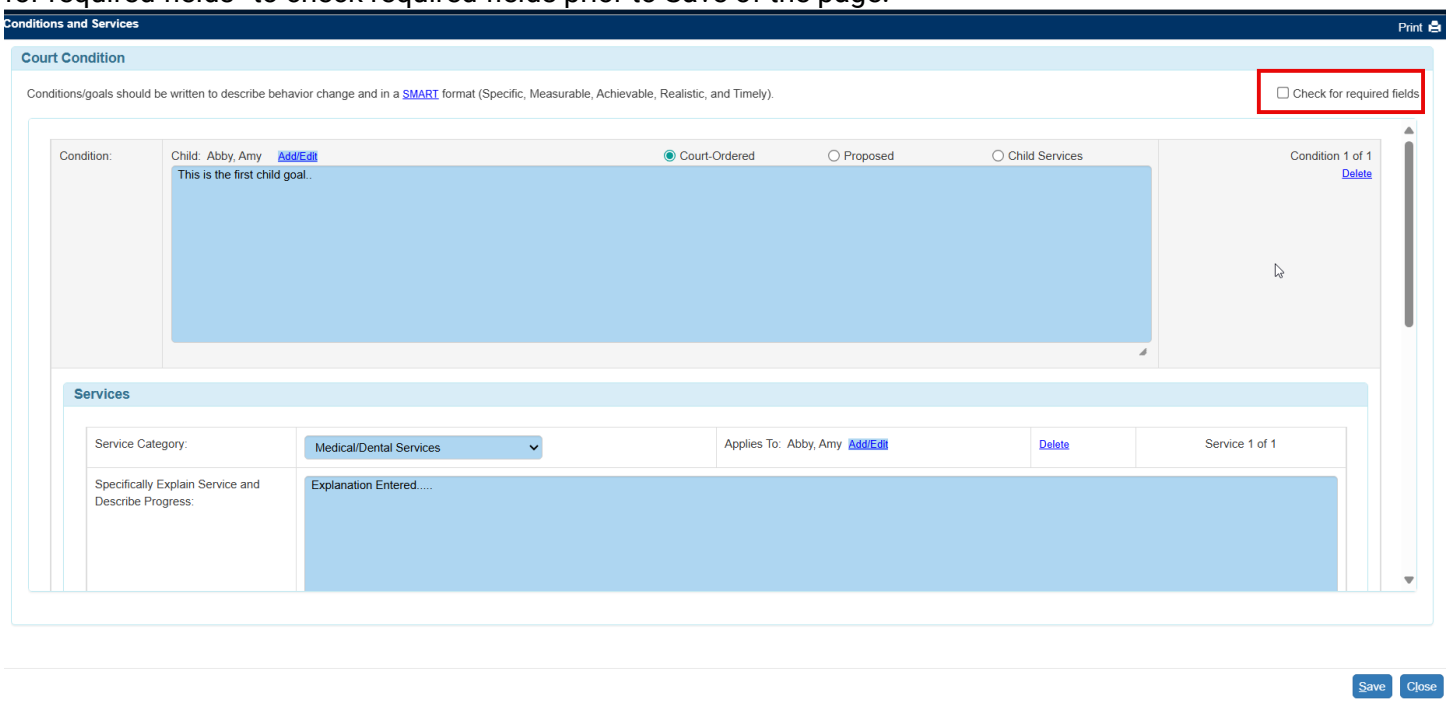


20. The Services can be applied to multiple children/youth associated with each Condition by selecting the Add/Edit hyperlink in the Applies To: field. Or additional Services can be inserted for each child/youth. Each Condition a child/youth is associated with, requires an applicable Service.
21. The Child/Youth participants associated with the Condition will display upon selecting the Add/Edit hyperlink in the Applies To field. Select all that apply.



Note: To remove a child/youth from a Condition, the participants must first be removed from any applied Services.

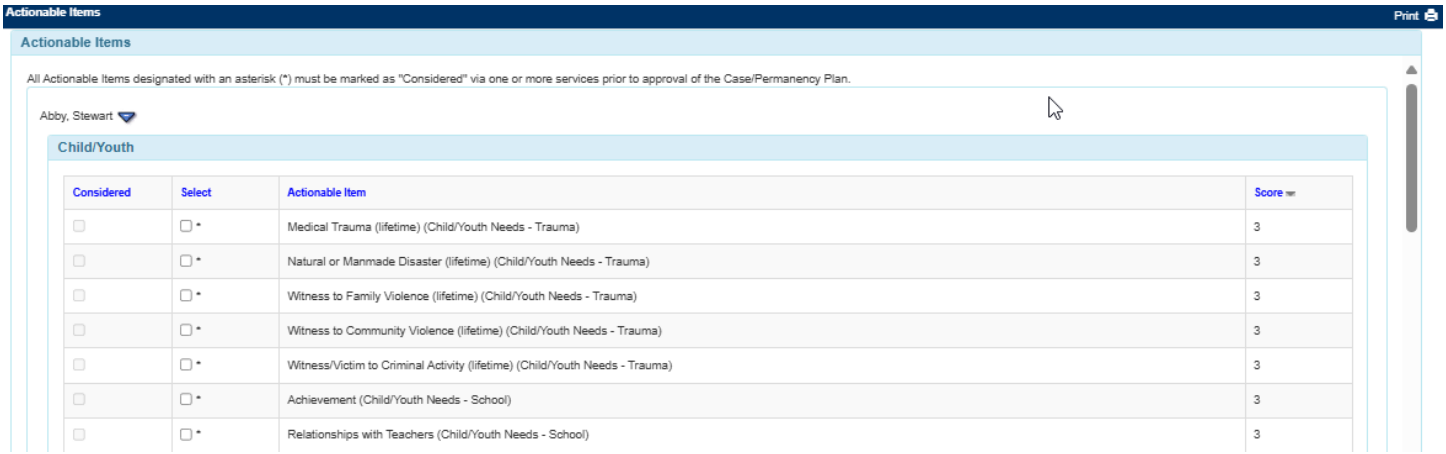
22. Each field is required on the page for any inserted Conditions or Services upon approval. Select the "Check for required fields" to check required fields prior to Save of the page.



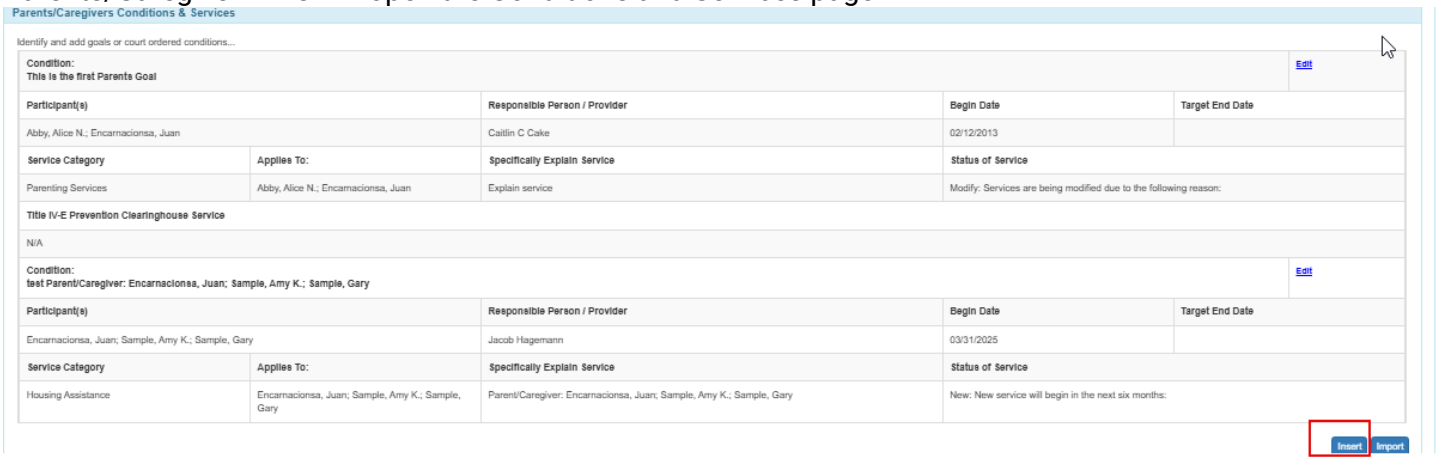
23. If Applicable, click on the Add/Edit hyperlink next to the Actionable Items from CANS. This will open the Actionable Items page.
24. On the Actionable Items page, select all applicable actionable items that relate to the service. Then click Continue to return to the Family Case/Permanency Plan page.

Note: This page will display all actionable items from the child's/youth's most recent CANS. Each of the items with an asterisk must be addressed with one or more service. All actionable items for the child/youth

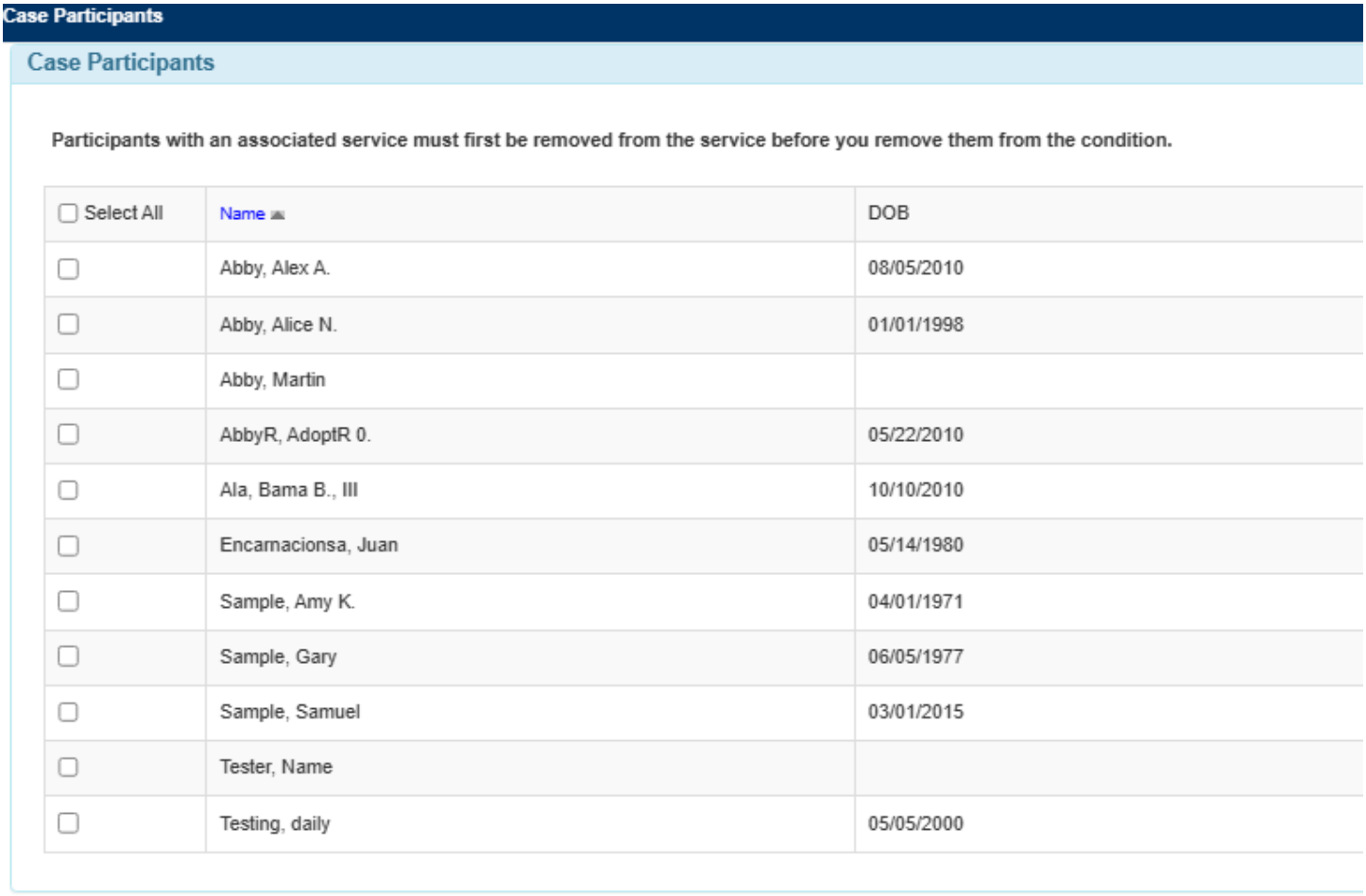
(excludes the actionable items for the current caregiver and primary identified permanent resource) must be addressed/considered in order to approve the Family Case Plan.



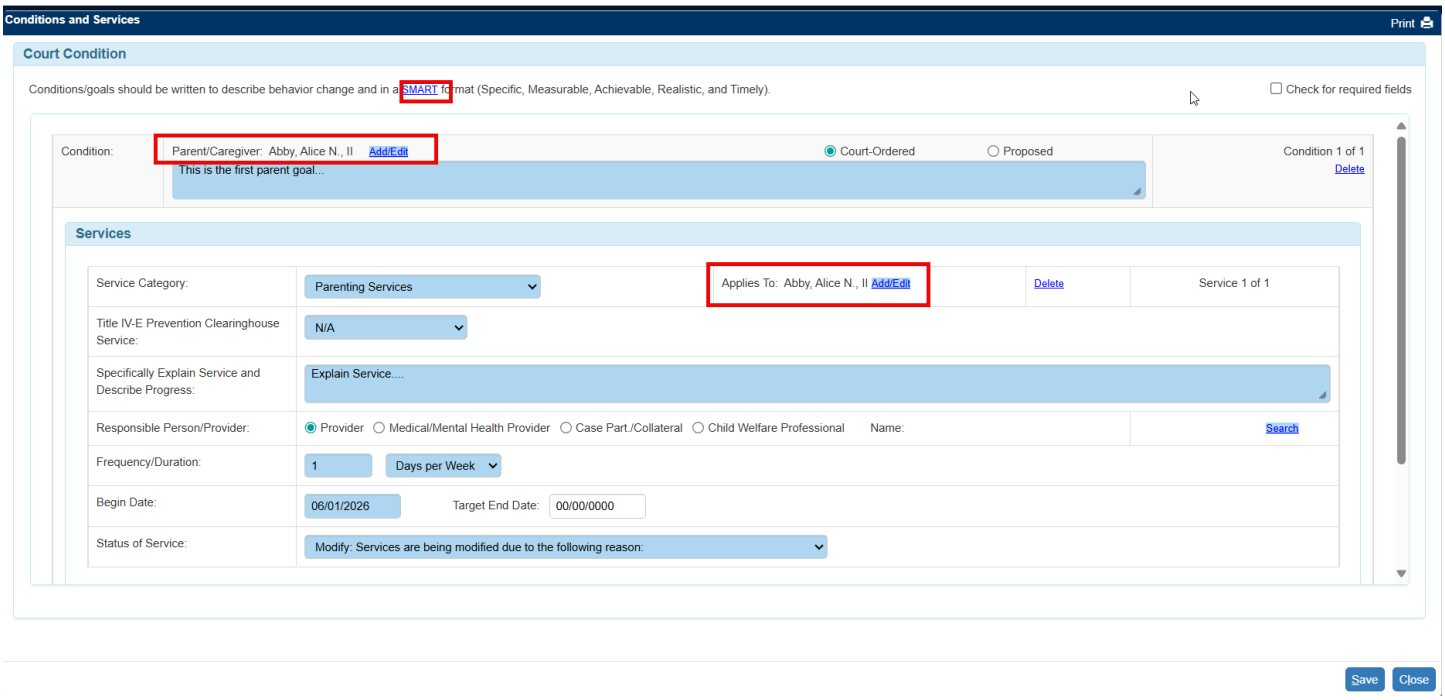
25. In the Parents/Caregivers Conditions & Services section, select the Insert button to add Conditions for the Parents/Caregiver. This will open the Conditions and Services page.



26. On the Conditions and Services page (accessed via the Insert button on the Planning & Services tab of the Family Case/Permanency Plan page), click the Add/Edit button to add the associated parents/caregivers. Multiple parents/caregivers can be added per Condition, if the same Condition applies.
27. On the Case Participants page, select the applicable parents/caregivers. Click Continue to return to the Conditions and Services page.



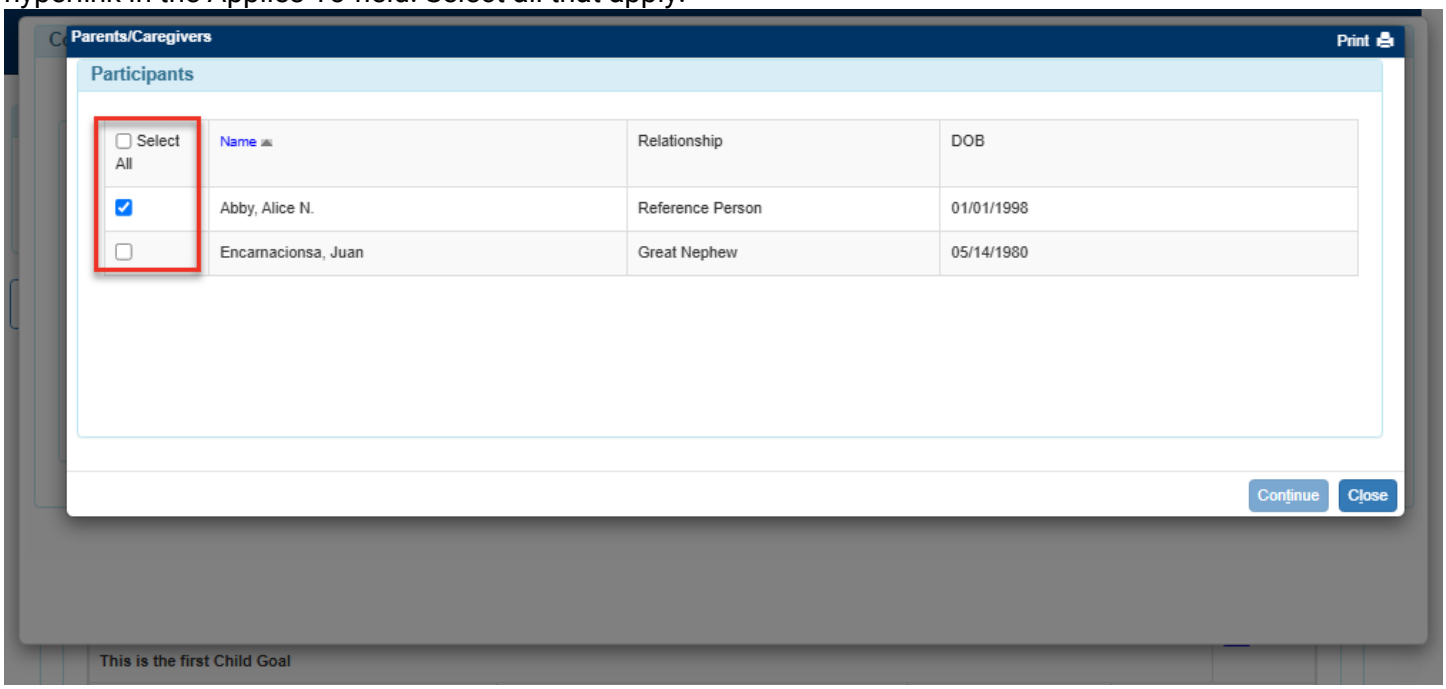
28. On the Conditions and Services page, enter a condition/objective and describe the Condition. In the Services section, select the Service Category and explain the service. In the Responsible Person/Provider section, select either the Provider, Medical/Mental Health Provider, Case Participant/Collateral or Worker radio button. Then click the Search hyperlink and search for the appropriate responsible person/provider. Enter the Frequency/Duration and Begin Date. If applicable, document the End Date. Describe the progress, select the status of the service, and document the description of the service. Click the Insert Service or Insert Goal buttons to add additional services or goals to this condition/objective. Click Save and Close to return to the Family Case/Permanency Plan page.



29. The Services can be applied to multiple parents/caregivers associated with each Condition by selecting the Add/Edit hyperlink in the Applies To: field. Or additional Services can be inserted for each parent/caregiver. Each Condition a parent/caregiver is associated with, requires an applicable Service.

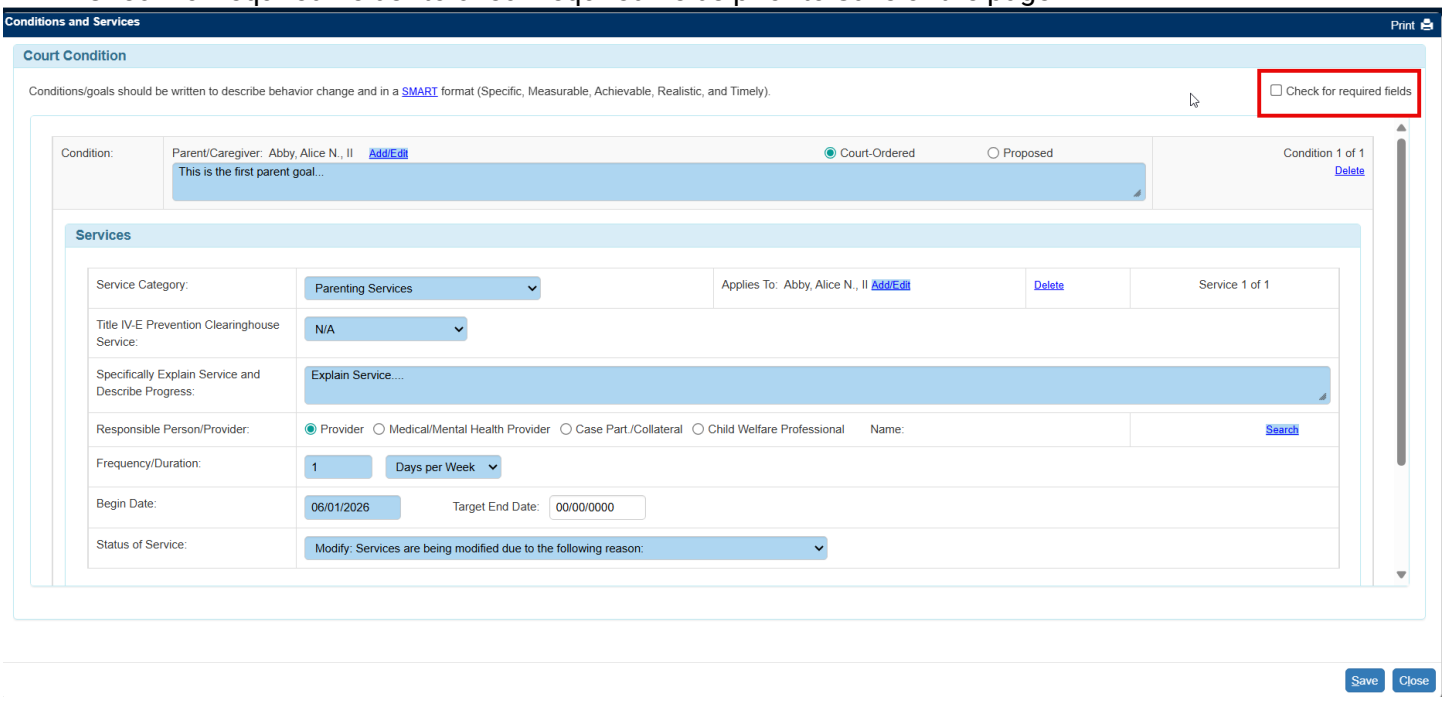
Note: Title IV-E Prevention Clearinghouse Services field only displays when the Service Category is Parenting Services. The Title IV-E Clearinghouse Service drop-down will have multiple options. Select one of the approved Title IV-E Clearinghouse Services or select N/A if the family is receiving a different service not listed.

30. The Parent/Caregiver participants associated with the Condition will display upon selecting the Add/Edit hyperlink in the Applies To field. Select all that apply.



Note: To remove a parent/caregiver from a Condition, the participants must first be removed from any applied Services.

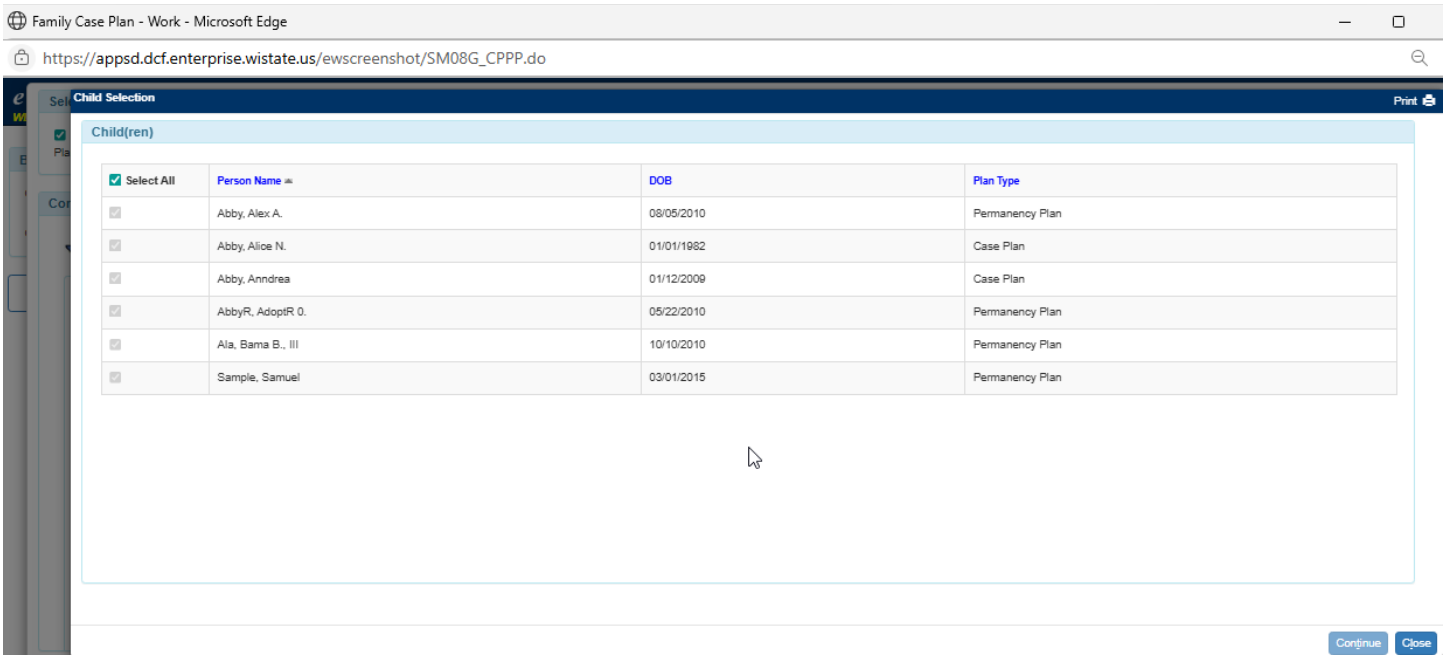
31. Each field is required on the page for any inserted Conditions or Services upon approval. Select the "Check for required fields" to check required fields prior to Save of the page.

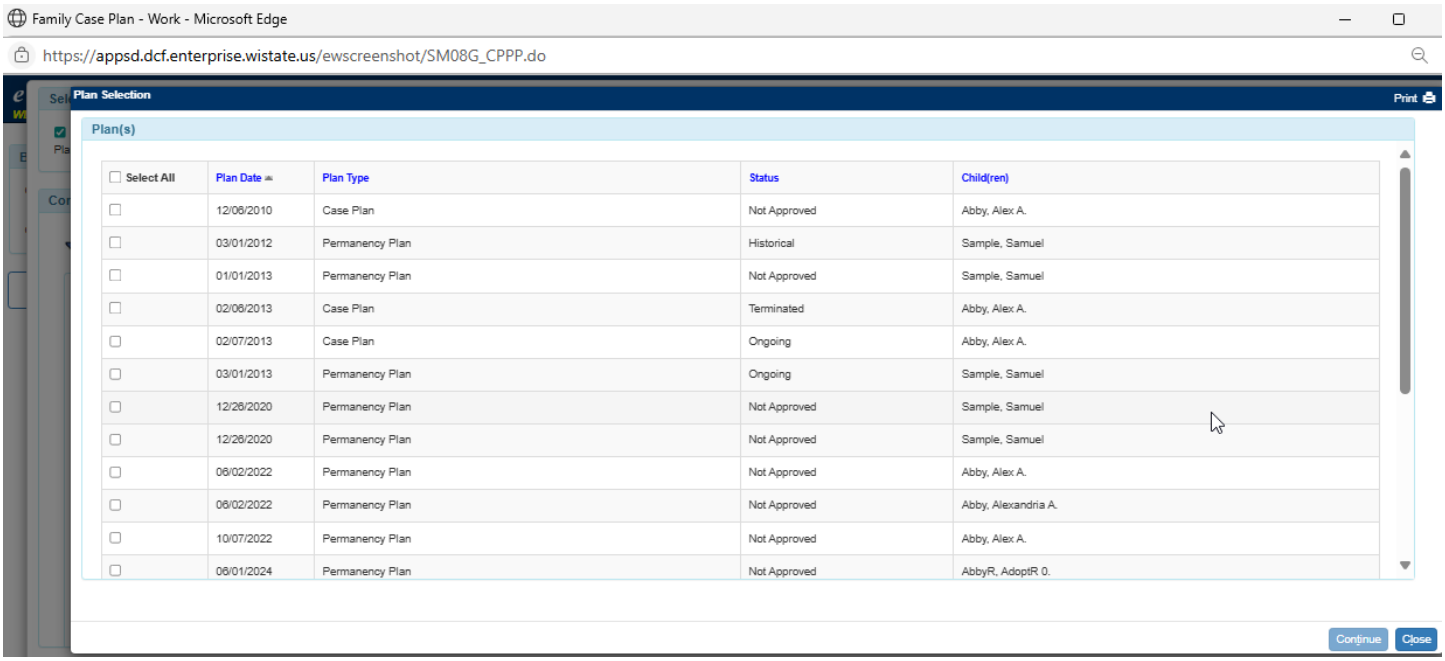


32. As noted above, clicking the Import button under the Child(ren)/Youth Conditions & Services or Parents/Caregiver Conditions & Services brings up the Conditions and Services Summary page. This page is used to copy goals from other Family Case/Permanency Plans on the case. By default, the Conditions and Services Summary page will display expanded for whichever section Child(ren) or Parents/Caregiver that the Import button was clicked under. Click the button to expand the other sections.

33. The Select Conditions & Services section is used to filter which plans the Conditions and Services on this page will come from. Unchecking Include Pending Family Case/Permanency Plans will hide any plan in a pending status.

34. By default, all children in the case will be selected (the Select by Child radio button is selected). Click the Select Child(ren) hyperlink to bring up the Child Selection page to select a specific child's plan.





35. Select the Select by Plan radio button to bring up the Plan Selection pop-up to select a specific plan.

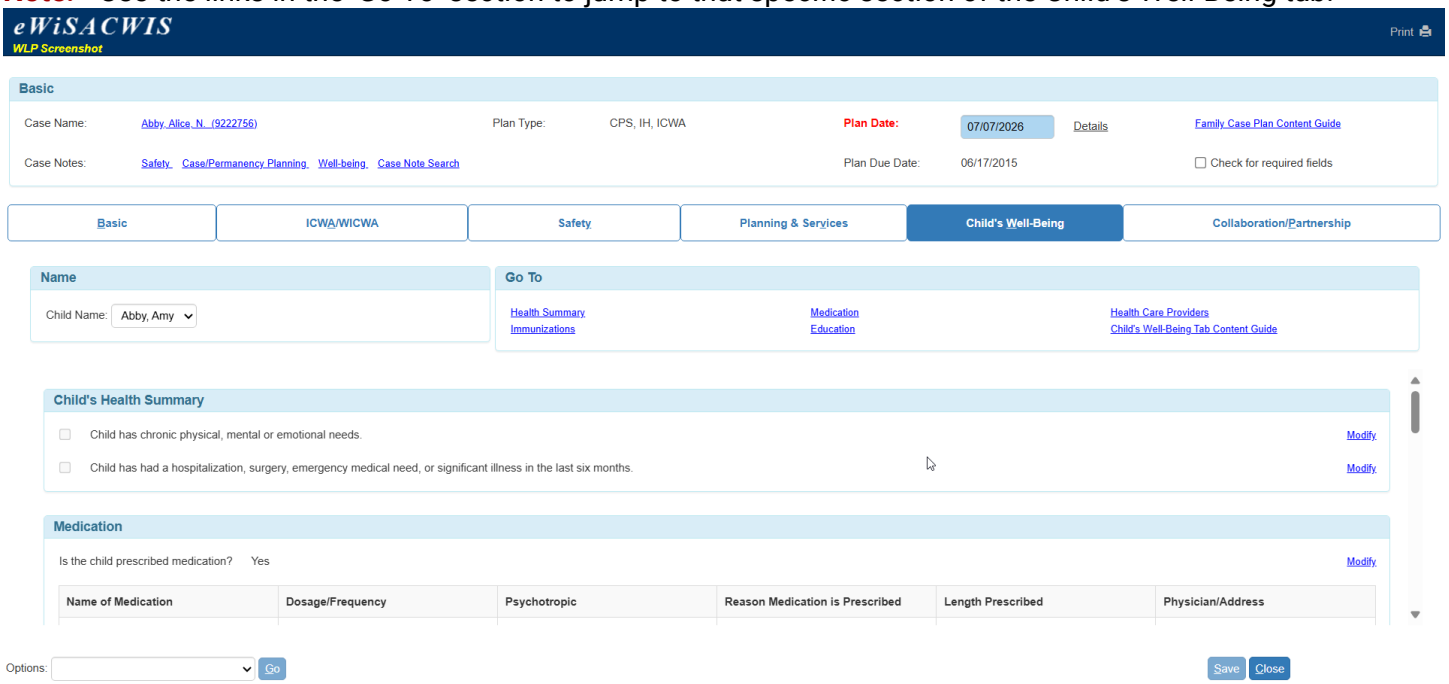
36. The Conditions & Services section is used to select the Condition/Objective, Conditions and Services that will be copied over. Check the box next to all that apply. Click Continue to return to the Family Case/Permanency Plan page, the selected Conditions/Objectives, Conditions and Services will appear under the corresponding Conditions & Services Section.

Note: Checking the box for a Service will automatically check the box for the associated Condition/Objective.

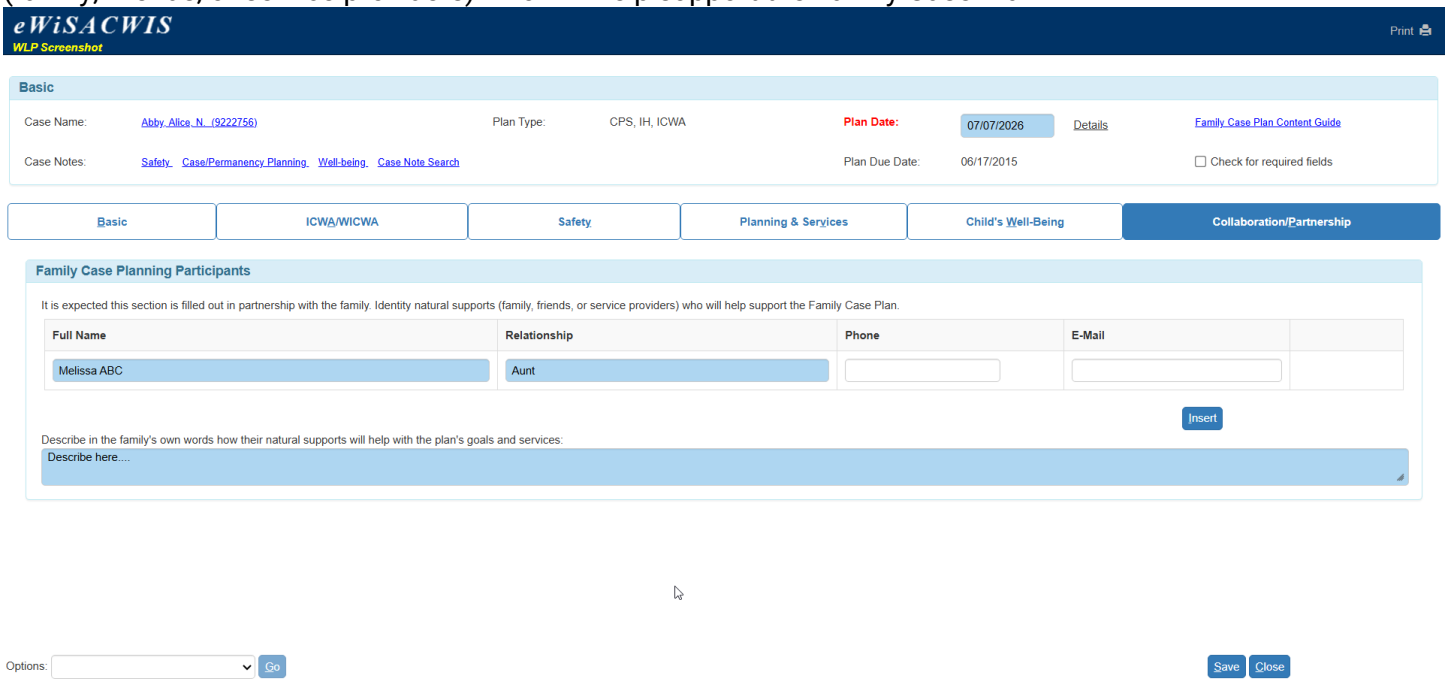
37. The next tab is the Child's Well-Being tab. If there are multiple children/youth on the Family Case Plan, select the child's/youth's name from the drop-down (select Yes to the pop-up to save the page) and the page displays with the Child's/Youth's Health Summary, Medication, Current Health Care Providers, Immunization Information, and Educational Summary sections. These fields are not enabled on this tab. All

information in the section pre-fills from the Person Management page. Click on the Modify hyperlink to update the associated information.

Note: Use the links in the 'Go To' section to jump to that specific section of the Child's Well-Being tab.

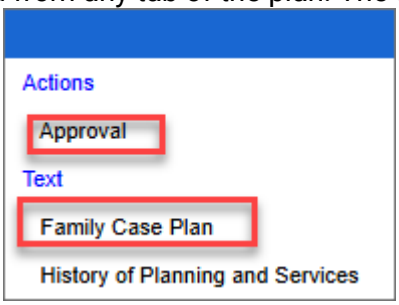


38. The next tab is the Collaboration/Partnership tab. The child welfare professional and family identifies natural support in the Family Case Plan so that the youth/parent knows who can help them make progress.
39. On this new tab, group box called "Family Case Planning Participants" is added to identify natural supports (family, friends, or service providers) who will help support the Family Case Plan.



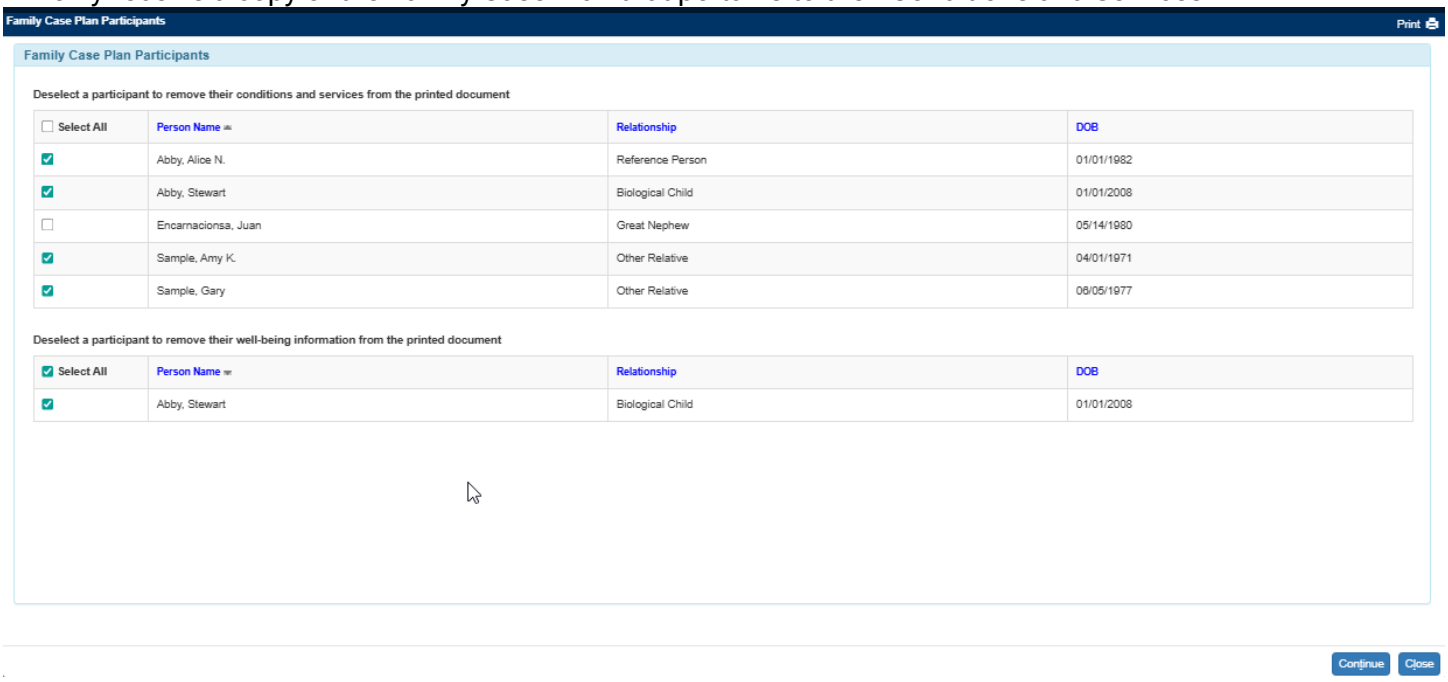
40. From the Options drop-down (on any of the tabs), the plan can be approved. Select Approval and click Go. On the Approval History page, select the Approve radio button and click Continue. On the Family Case/Permanency Plan page, click Save. If a future Plan Date was documented, the Plan Date can be updated to today's date.

41. The Family Case Plan template can be launched from any tab of the plan. The template will launch prior to approval. Select Family Case Plan and click Go.



Note: The Child Welfare Professional and Supervisor names will not pre-fill to the template until after approval. The template should be printed after approval.

42. After approval, when launching the template a Family Case Plan Participants page will display. The Participants will all be selected by default but can be de-selected. This deselection options allows the Family Case Plan to exclude participants and their subsequent Conditions and Services from the Family Case Plan, for example if there are several Parents/Caregivers living in different households. This allows for discretion by the Child Welfare Professional to allow each participant in separate homes for example to only receive a copy of the Family Case Plan that pertains to their Conditions and Services.



Close

Draw 1 of 4

Family Case Plan

Use of form: Personal information you provide may be used for secondary purposes [Privacy Law, s. 15.04(1)(m), Wisconsin Statutes].

eWiSACWIS Case ID: 9222756

Full Name	Birth Date (mm / dd / yyyy)	Age
Abby, Amy	01/05/2021	5 Years

Date – Family Case Plan	Name – Agency
07/07/2026	BMCW-Admin
Full Name – Child Welfare Professional	Full Name – Supervisor

ICWA / WICWA

Amy Abby Tribe(s): Non-WI Tribe

The responsibility of engaging and including the Indian child's tribe is incumbent upon the county child welfare agency, not the tribe.

Describe collaboration efforts with each Indian child's tribe in the planning process of the Family Case Plan.

sadhbjdslkl

Describe efforts to notify and consult with each Indian child's extended family as part of the development of the Family Case Plan.

shdbdcnksd

For each Indian child's tribe, describe efforts to connect the family with prevailing social and cultural standards or specific resources, programs, or services.

shbnxmsakl

For each identified household of the Indian child, describe the services that will sustain the in-home plan and prevent removal and break up of an Indian family.

shbnckmsl

SAFETY

1. ☐ Yes ☐ No A plan is necessary to maintain the child's / youth's safety and mitigate the imminent risk of removal from the home and entry into out of home care.

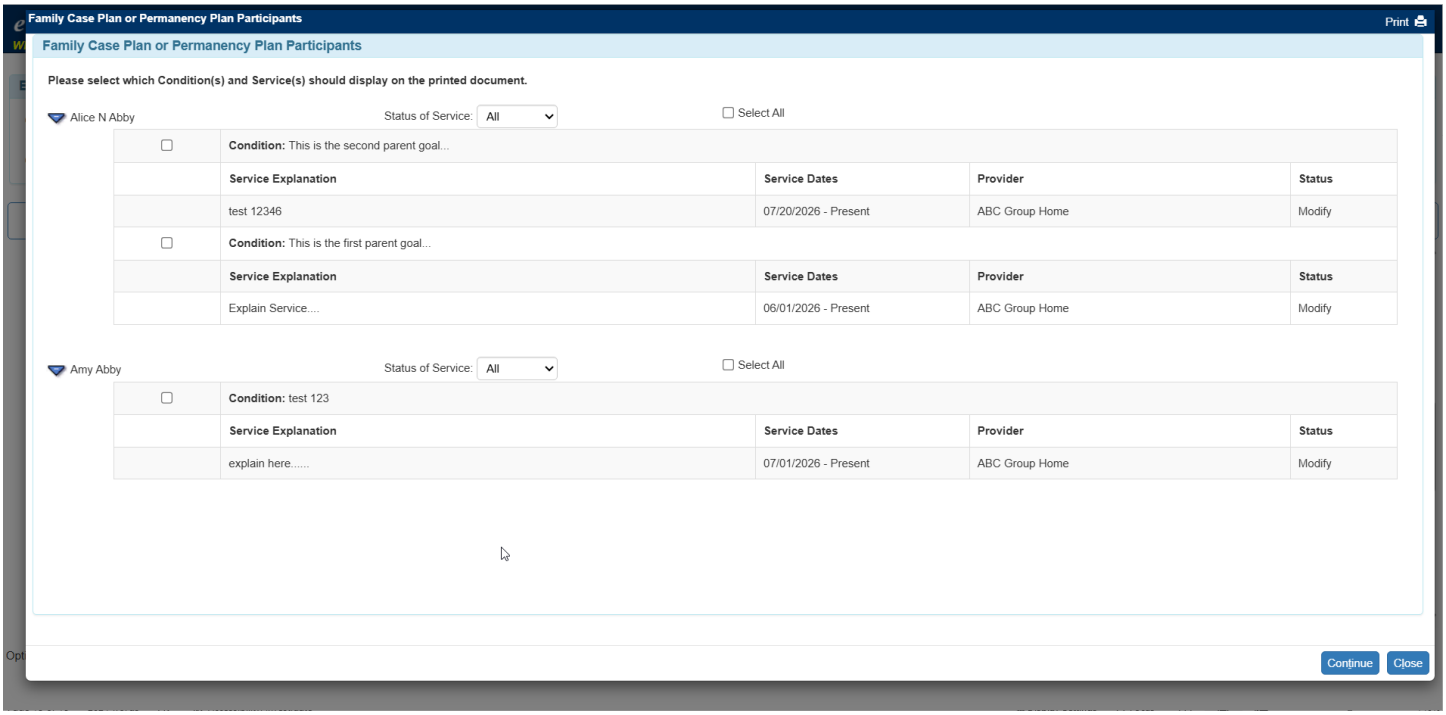
2. Safety Services
The Identified Safety Threat; Diminished Protective Capacity; and the associated Safety Service / Action Type, Safety Service Provider and the specific explanation of the safety service / action and how it will control the threat identified are listed below:

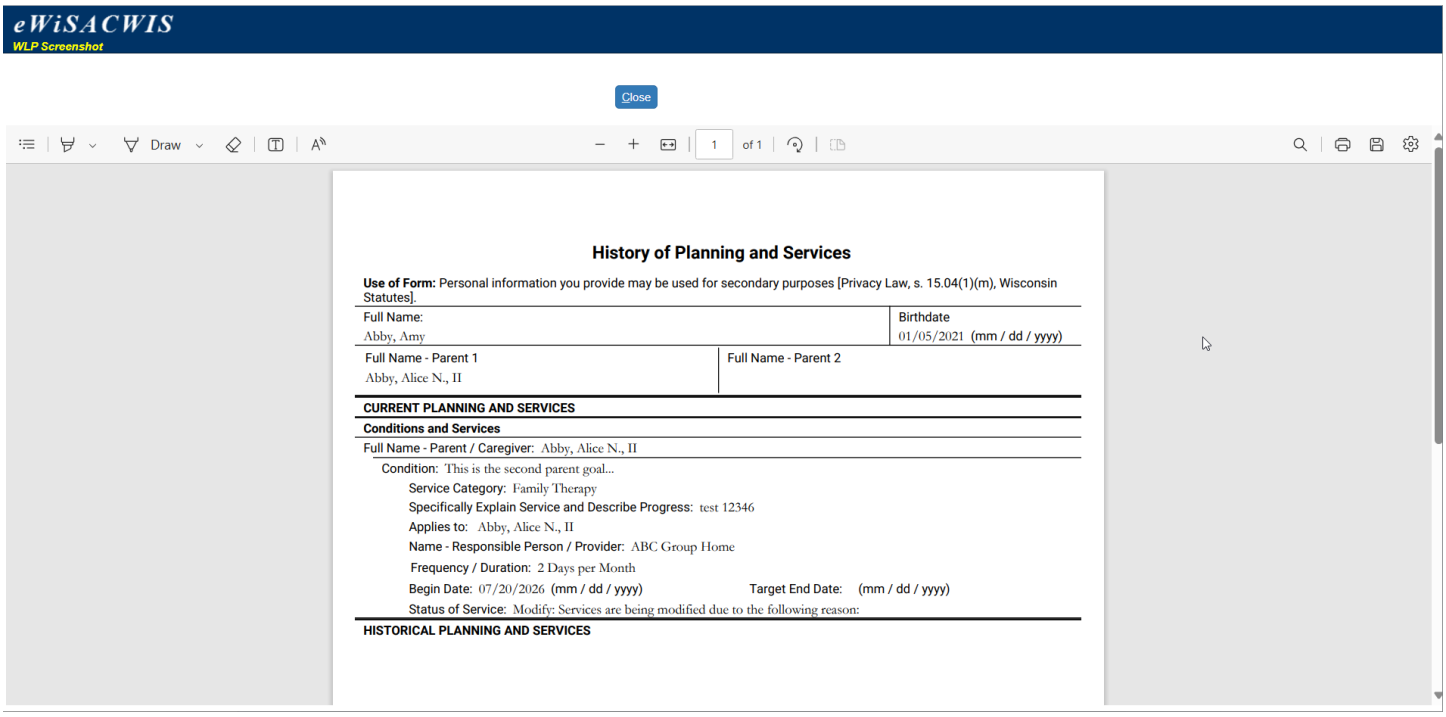
Identified Safety Threat

Description:

43. The History of Planning and Services template can be launched from any tab of the plan. This template contains the full history of Conditions & Services that have been documented for the child(ren)/youth on this plan (it does not print the selected period if the Display History Checkbox is selected). Select History of Planning and Services and click Go.
44. Select the Goal(s) you want to include in the printed document by checking one or more Goals in the History of Planning & Services template. Click, Continue then generate or print the document. Only selected Goal(s) will be included in the template.

Note: Printing only the selected Goal(s) allows youth and parents to focus on specific goals, making it easier to track progress.





45. The Family Case Plan will appear on the desktop under the Family Case/Permanency Plan icon. Click the Family Case Plan icon to see all the related work associated to that Family Case Plan.