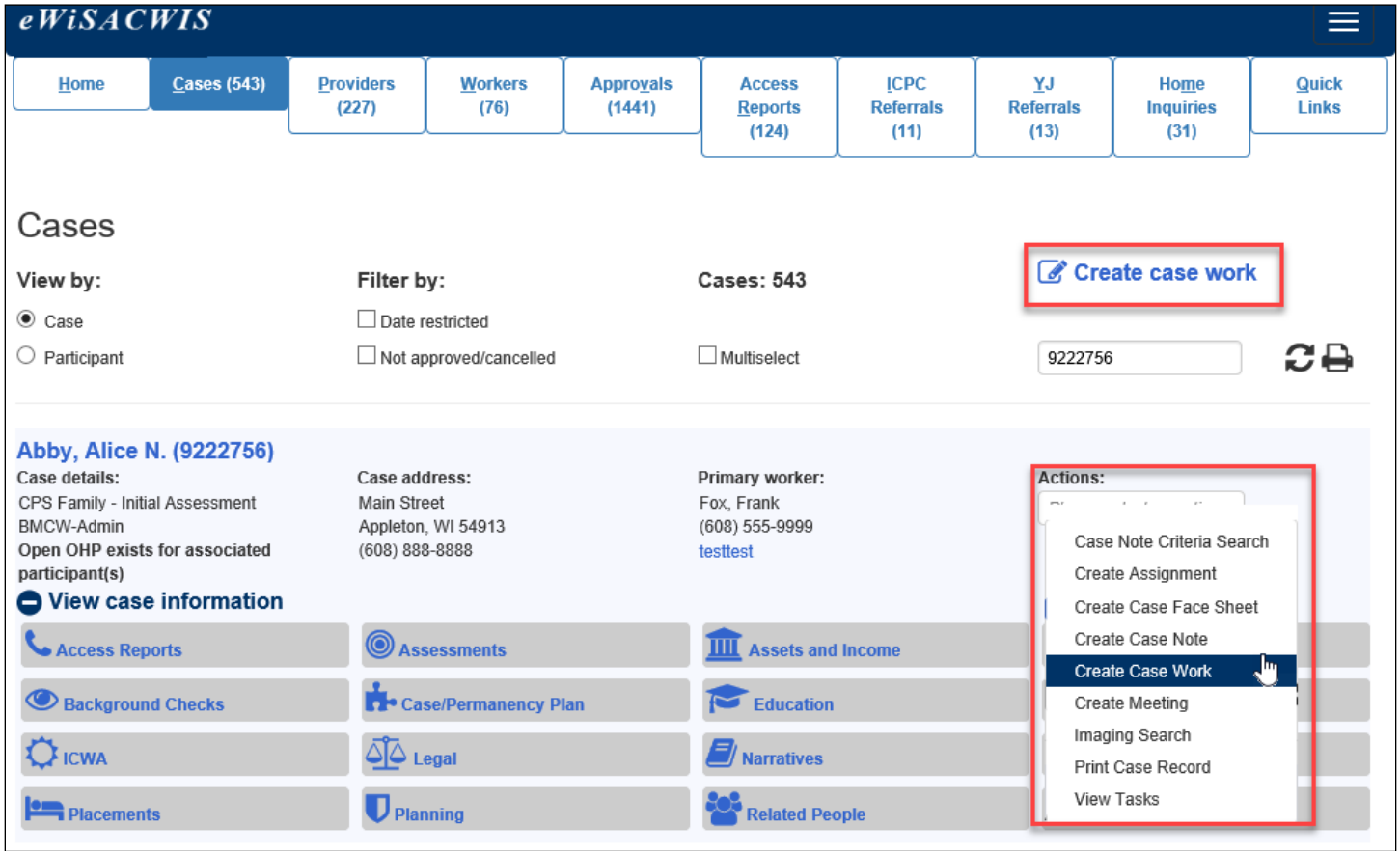
# Permanency Plan

The Permanency Plan serves as a tool for communication with parents/caregivers, children and their family members, court parties, and other individuals in providing support and services to the family. It provides the parties an update on the progress towards the child or youth's identified permanency goal.

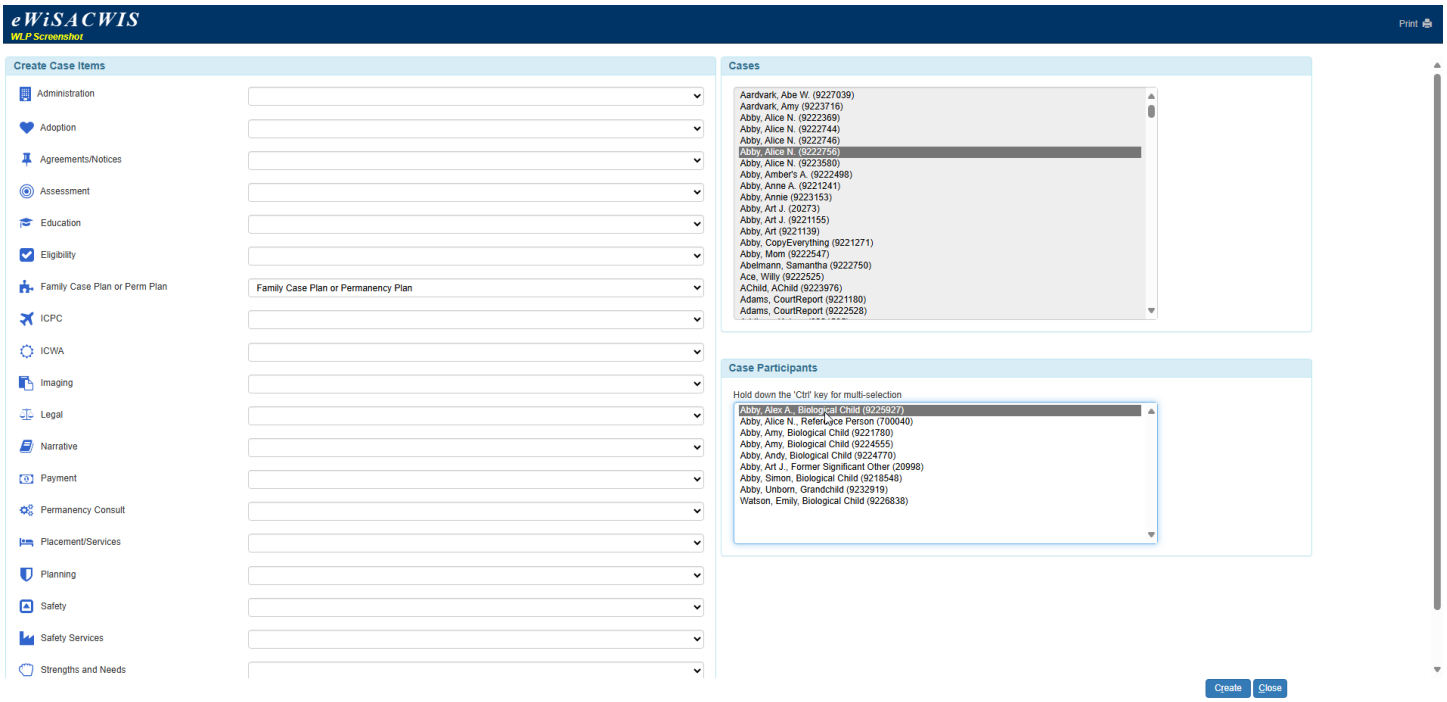
**Note:** To create a Permanency Plan, an assignment to the case and security is needed. See the Permanency Plan Writing Guide for content details.

1. From the desktop, go to the Cases tab and click the Create Case Work icon or select Create Case Work from the Actions dropdown next to the specific case to open the Create Case Work page.

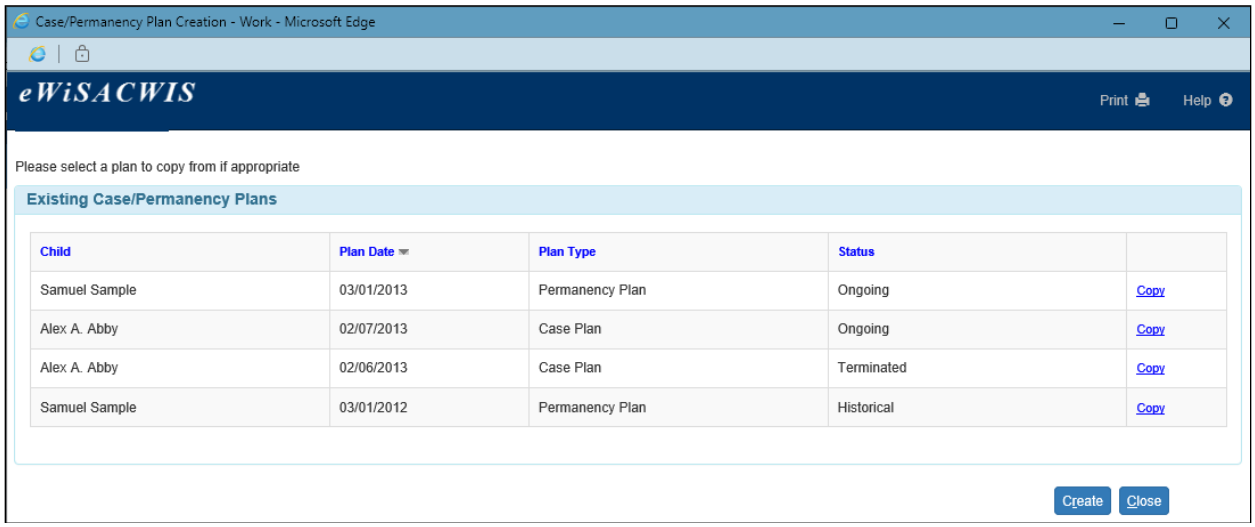



2. On the Create Case Work page, select Family Case/Permanency Plan from the Family Case/Perm Plan dropdown. Select the family and the case participant. Then click Create.

**Note:** A Person Type is required to create a Permanency Plan. See the Person Management User Guide for additional information. If a pending plan exists, it must be opened from the desktop. Click the Family Case/Permanency Plan topic button to expand the associated work.

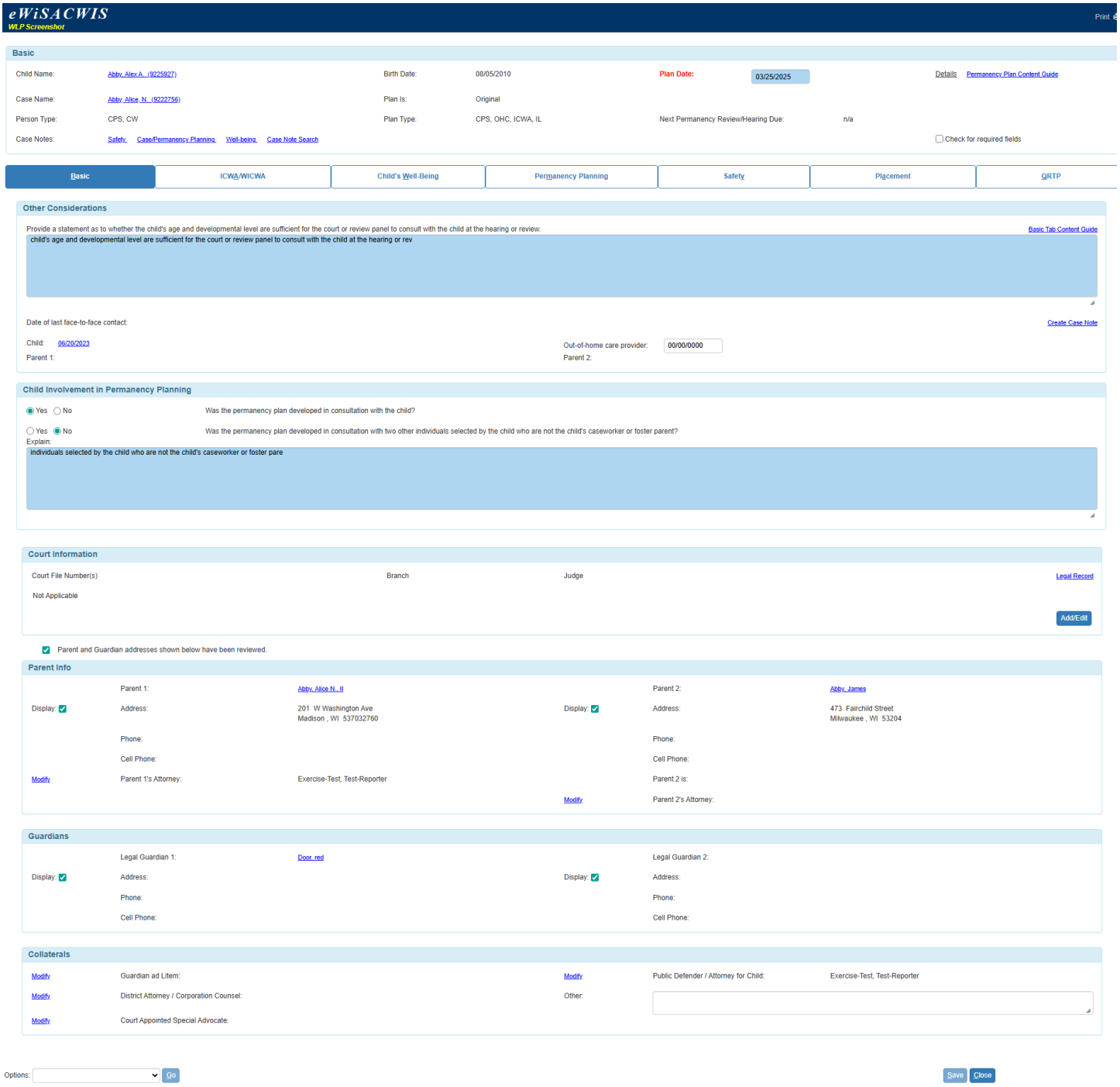



3. If an approved Permanency Plan or Family Case Plan exists, the Family Case/Permanency Plan Creation page will appear. Click the Copy hyperlink to copy an associated Plan. Otherwise, click Create to create a new Permanency Plan. Be sure to review all tabs if copy over is used including narrative fields.




4. On the Family Case/Permanency Plan page, a date will prefill in the Plan Date field based on when the next plan is due. The Plan Date will determine what type of plan displays, based on the child's Person Type and if there is an existing placement during that date.

**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. A future Plan Date is not allowed but upon approval you will be able to update the Plan Date to the approval date.




The first tab is the Basic tab. Permanency Plan opens in create or edit mode to the Basic tab. The Basic tab always displays for both Plan Types but the group boxes and fields on the Basic tab conditionally display based on the Plan Type, once eWiSACWIS calculates the Plan Type.

1. The basic tab has sections of Other Considerations, Court Information, Parent Info, Guardians, Indian Custodians, and Collaterals. Any information already documented on Person Management, Legal Record, or the Case Notes.

2. In the Other Consideration section, proved a statement and review the Date of last face-to-face contact. Click Create Case Note hyperlink to add face-to-face contact notes for the Child, Parent 1, and Parent 2.

a. Enter the Out-of-home care provider date.

**Note:** For more information on how to fill out the basic tab click the Basic Tab Content Guide hyperlink.

3. In the Court Information section on the basic tab, click the Add/Edit button to add/edit the court information. To add court information, click the Legal Record hyperlink. If Court Information exists a selection page will display choices to choose from or a "Not Applicable" checkbox. click the Continue button to return to the Case/Permanency Plan page

4. The Parent Info section will prefill with any information documented on Person Management. Check the Parent, Guardian, and Indian Custodian addresses shown below have been reviewed check box when the information is verified and up to date for all three sections. The verification is required to approve the plan. Click the Modify hyperlink to update the information for Parent 1 and Parent 2.

    b. Uncheck Display to keep the Parent address from displaying on the plan document.

5. The Guardian section will prefill with any information documented on Person Management for Guardians.

    c. The Modify hyperlink in the Parent Info section to update the information.
    d. Uncheck Display to keep the Parent address from displaying on the plan document.

6. The Indian Custodians section will prefill with any information documented on Person Management for Indian Custodians.

    e. The Modify hyperlink in the Parent Info section to update the information.
    f. Uncheck Display to keep the Parent address from displaying on the plan document.

7. The Collaterals section displays the Case Collaterals documented on the Maintain Case page.

    g. Click the Modify hyperlink to update any of the collaterals or enter a comment in the Other: field.

## Other Considerations

Provide a statement as to whether the child's age and developmental level are sufficient for the court or review panel to consult with the child at the hearing or review. Basic Tab Content Guide

Date of last face-to-face contact: Create Case Note

Child:

Parent 1: 11/04/2014

Out-of-home care provider: 00/00/0000

Parent 2:

## Court Information

Court File Number(s) | Branch | Judge | Legal Record

Add/Edit

☐ Parent, Guardian, and Indian Custodian addresses shown below have been reviewed.

## Parent Info

| | | | | | |
|---|---|---|---|---|---|
| | Parent 1: | Abby, Alice N. | | Parent 2: | Abby, James |
| Display: ☑ | Address: | 456 session 456<br>Baraboo , WI 50707 | Display: ☑ | Address: | 473 Fairchild Street<br>Milwaukee , WI 53204 |
| Modify | Parent 1's Attorney: | | | Parent 2 is: | |
| | | | Modify | Parent 2's Attorney: | |

## Guardians

| | | | | | |
|---|---|---|---|---|---|
| | Legal Guardian 1: | Green, Bonnie | | Legal Guardian 2: | Green, Chris |
| Display: ☑ | Address: | 987 N. Hawk Road<br>Milwaukee , WI 53206 | Display: ☑ | Address: | |
| | Phone: | | | Phone: | |
| | Cell Phone: | | | Cell Phone: | |

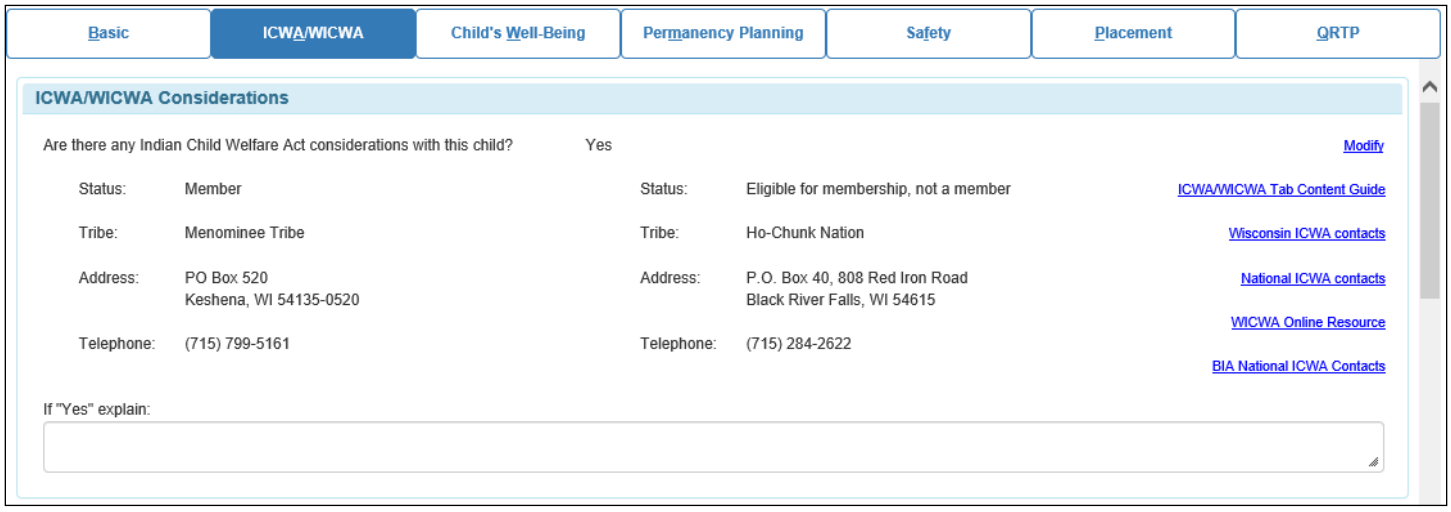
## Indian Custodians

| | | | | | |
|---|---|---|---|---|---|
| | Indian Custodian 1: | Wolverine, Uncle | | Indian Custodian 2: | |
| Display: ☑ | Address: | 1981 Harbor Blvd<br>Ann Arbor , MI 61245 | Display: ☑ | Address: | |
| | Phone: | | | Phone: | |
| | Cell Phone: | | | Cell Phone: | |


**Note:** If the child is over 18 and extending foster care to 21 face to face contact dates related to the parents, as well as the parent/caregiver and family sections will not display, and the Plan Type will show EXT. When attempting to create a plan for a child who may be eligible for the extension users will receive the message below. Clicking "Yes" will take the worker to the Independent Living record to complete the extension eligibility. See the Independent Living User Guide for more details.

The second tab is the ICWA/WICWA tab. Only if the ICWA Considerations is "Yes" then all the pertinent information displays in this section. If ICWA/WICWA membership is documented, an ICWA/WICWA tab will display. For more information on how to fill out the basic tab click the Basic Tab Content Guide hyperlink.

Click the Modify hyperlink to update the child's race, ethnicity, and tribal information on the Person Management page. If the answer is "No", this tab will not display. When "Yes", a Statement of Active Efforts document will be created with the Permanency Plan document.




1. The ICWA/WICWA Considerations section will prefill with any tribal status' documented on Person Management. Click the Modify hyperlink to update. Other helpful hyperlinks are included in this section including the ICWA/WICWA Tab Content Guide.

2. ICWA/WICWA Placement Preferences will prefill with any Placements that are created after a child/youth has documented as having tribal membership. This information will prefill from the ICWA tab of the documented placement.

    a. All remaining radio buttons and narratives in this section are required to approve the plan.

3. The ICWA/WICWA Active Efforts section are all the required questions and narratives for an ICWA/WICWA placement.  This section will prefill on the Statement of Active Efforts document that will be created with the Permanency Plan document is created.

Basic | ICWA/WICWA | Child's Well-Being | Permanency Planning | Safety | Placement | QRTP

## ICWA/WICWA Placement Preferences

If the child is an Indian child, provide a statement as to whether the Indian child's placement is in compliance with the order of the placement preference, and if the placement is not in compliance with that order, a statement as to whether there is good cause for departing from that order.

| Placement Is | Placement Preference | Describe the action taken to comply with statutory placement preferences |
|---|---|---|

Does the Tribe have their own placement preferences? ○ Yes ○ No

Is the child in a placement setting that meets the placement preferences as outlined by ICWA/WICWA? Details ○ Yes ○ No

Has the court made a good cause finding to depart from the placement preferences? ○ Yes ○ No

Describe your diligent efforts in the past six months to locate a placement that meets the preferences outlined by ICWA/WICWA.

Describe

## ICWA/WICWA Active Efforts

If the child is an Indian child, describe the remedial services and rehabilitation programs offered in an effort to prevent the break-up of the Indian child's family.

Describe

Representatives designated by the Indian child's tribe with substantial knowledge of prevailing social and cultural standards and child-rearing practice within the tribal community were requested to evaluate the circumstances of the Indian child's family and to assist in developing a case plan that uses resources of the tribe and Indian community, including traditional and customary support, actions, and services. ○ Yes ○ No

Describe activities or explain why not conducted

Describe

A comprehensive assessment of the situation of the Indian child's family was completed, including a determination of the likelihood of protecting the child's health, safety, and welfare effectively in the child's home. ○ Yes ○ No

Describe activities or explain why not conducted

Representatives of the Indian child's tribe were identified, notified, and invited to participate in all aspects of the proceedings at the earliest possible point and their advice was actively solicited throughout the proceedings. ○ Yes ○ No

Describe activities or explain why not conducted

Extended family members of the Indian child, including extended family members who were identified by the Indian child's tribe or parents, were notified and consulted with to identify and provide family structure and support for the Indian child, to assure cultural connections, and to serve as placement resources. ○ Yes ○ No

Describe activities or explain why not conducted

Arrangements were made to provide natural and unsupervised family interaction in the most natural setting that can ensure the Indian child's safety, as appropriate to the goals of the permanency plan, including arrangements for transportation and other assistance to enable family members to participate in that interaction. ○ Yes ○ No

Describe activities or explain why not conducted

All available family preservation strategies were offered or employed and the involvement of the Indian child's tribe was requested to identify those strategies and to ensure they are culturally appropriate to the tribe. ○ Yes ○ No

Describe activities or explain why not conducted

Community resources offering housing, financial, and transportation assistance and in-home support services, in-home intensive treatment services, community support services, and specialized services for members of the Indian child's family with special needs were identified, information about those resources was provided to the family, and the family was actively assisted or offered active assistance in accessing those resources. ○ Yes ○ No

Describe activities or explain why not conducted

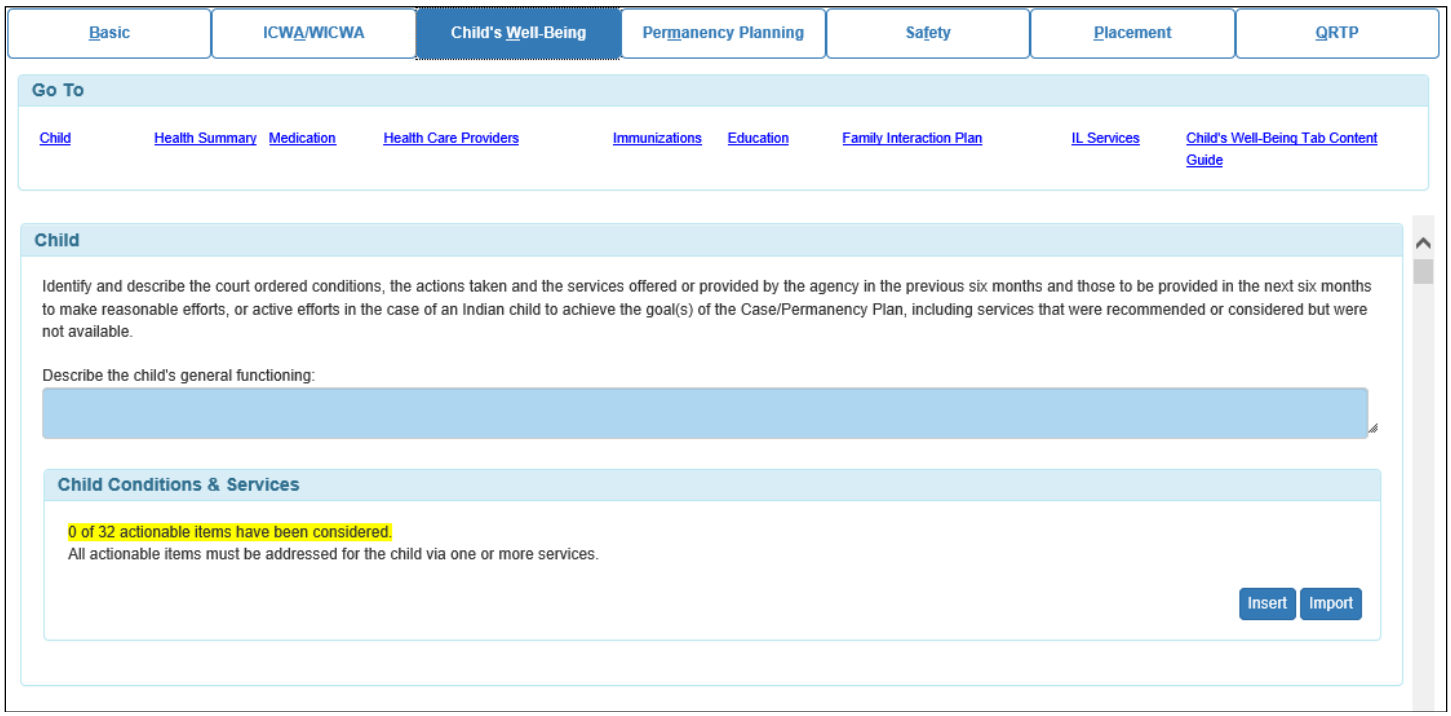
Monitoring of client progress and client participation in services was provided. ○ Yes ○ No

Describe activities or explain why not conducted

Options: Go Save Close

The Child's Well-Being tab is used to review and document the Child/Youth's general functioning and Conditions & Services, Health Summary, Medication, Health Care Providers, Immunizations, Education, Family Interaction Plan, and Independent Living (IL) Services.

1. In the Go To section each section has a quick navigation hyperlink in this section. This section also has a Child/Youth's Well-Being Tab Content Guide hyperlink that will open the Well-Being section of the Permanency Plan Writing Guide.




2. In the Child section, describe the child/youth's general functioning and document reasonable efforts or active efforts in the case of an Indian child. The Child section will prefill information from the most recent pending or approved Assessment, if applicable.

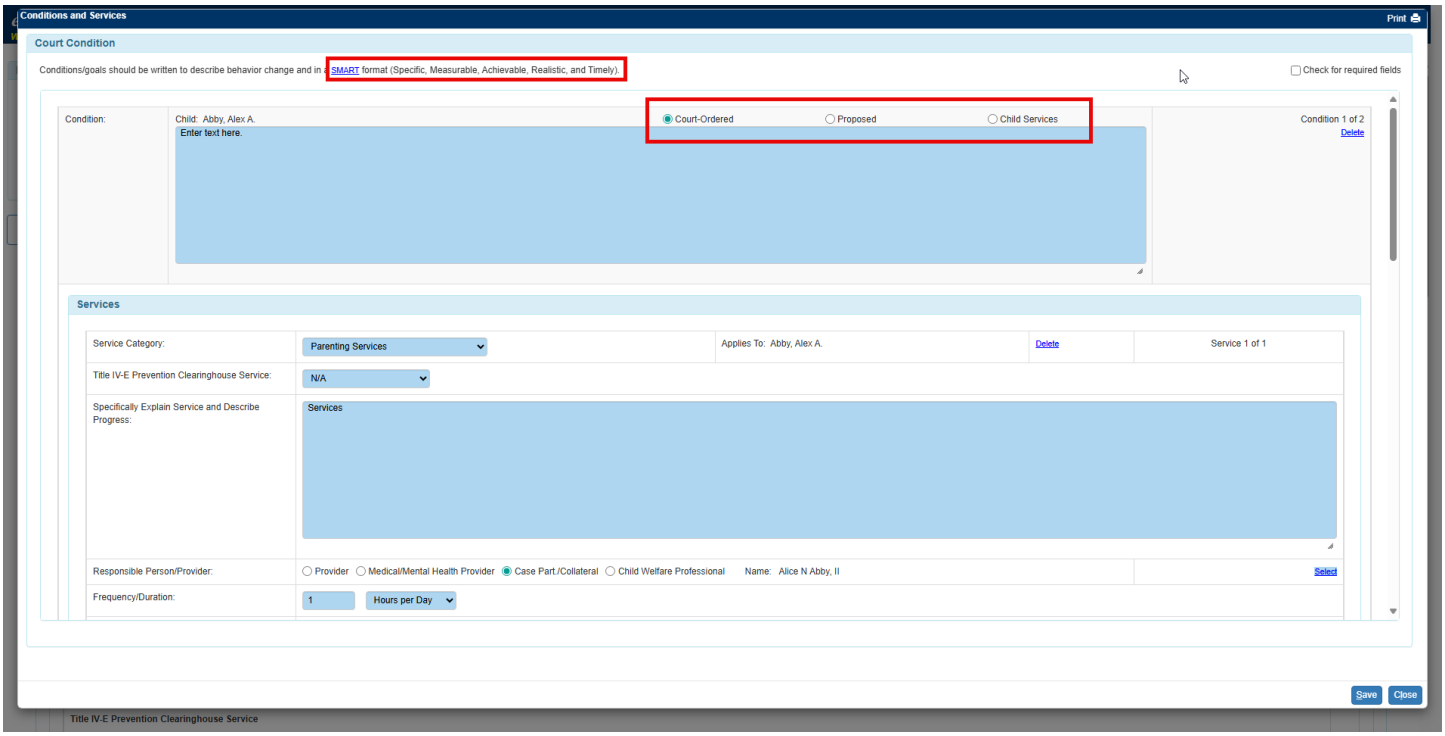
**Note:** The text highlighted in yellow displays the number of actionable items from CANS that need to be addressed to approve the plan.

3. The Child Conditions & Services section will display the actionable items from an approved CANS.
    a. This section displays Conditions and Services which were provided in the last 6 months or will be provided in the next 6 months.
    b. To Add Conditions and Services click the Insert button.

4. To enter a condition and service, one of the three radio buttons will need to be selected at the top of the Conditions and Services page.
    a. Once either Court Ordered, Proposed, or Child Services is selected, Conditions and Services can be entered.

**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.

**Note:** Title IV-E Prevention Clearinghouse Services field only displays when the Service Category is Parenting Services. The Title IV-E Clearinghouse Service dropdown 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. Currently, a very small number of CPS families receive a Title IV-E Clearinghouse service. For most case situations you would select N/A.

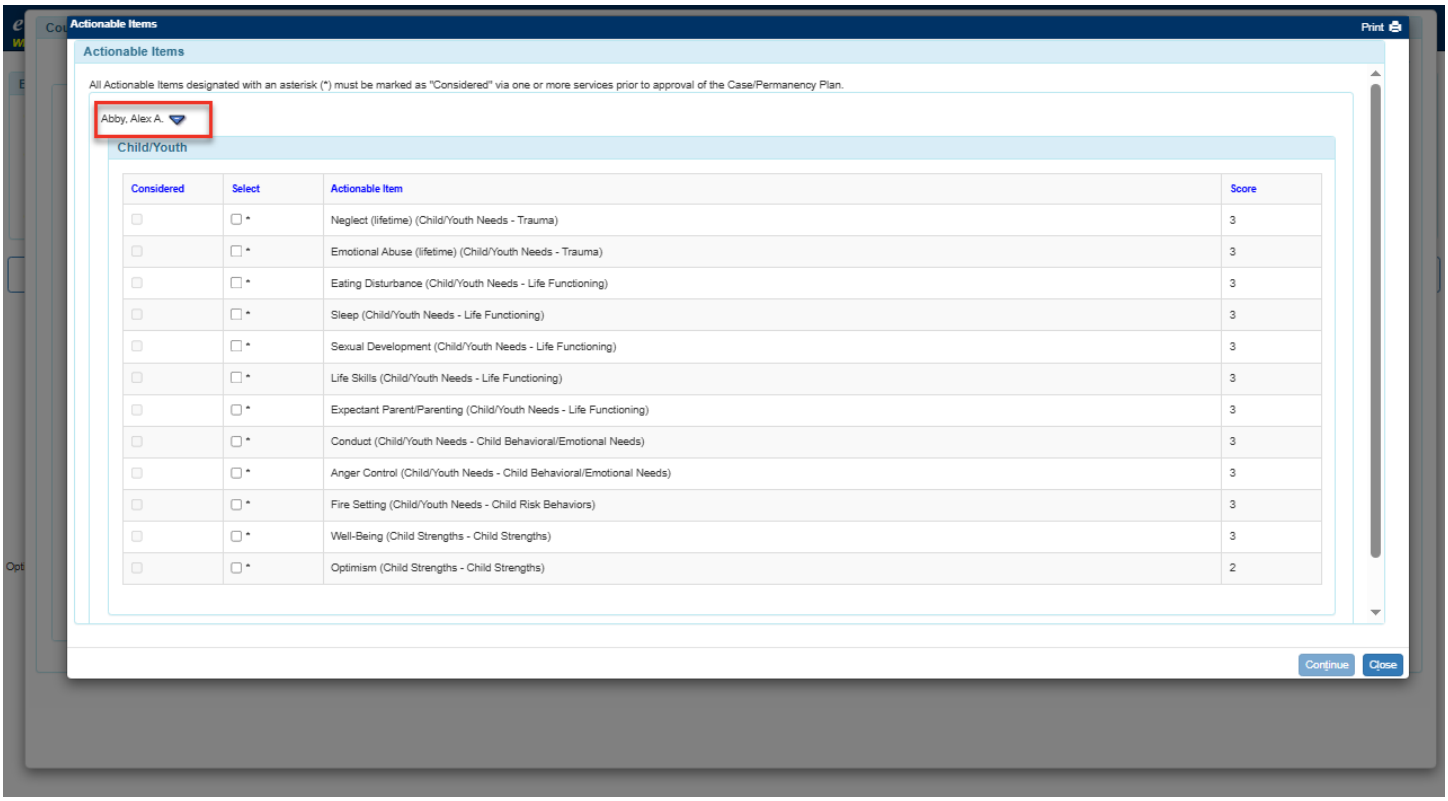



5. All fields are required upon approval when a condition is inserted except for a Target End Date. To check required fields prior to approval, select the "Check for required fields" checkbox before saving the page. To document Responsible Person/Provider, select the appropriate radio button and click the Select hyperlink to select a person/provider. Depending on the selection the hyperlink with either launch the Provider Search, Medical Provider Clinic Search Page, Participants/Collaterals selection page, or the Worker Search page. Select the radio button from the search results and click Continue to return to the Conditions and Services page. The selected person/provider will display for the Responsible Person/Provider field.

6. To address Actionable Items from CANS, click the Add/Edit hyperlink.

    a. On the Actionable Items page, select all applicable actionable items that relate to the service. Then click Continue to return to the Permanency Plan page.

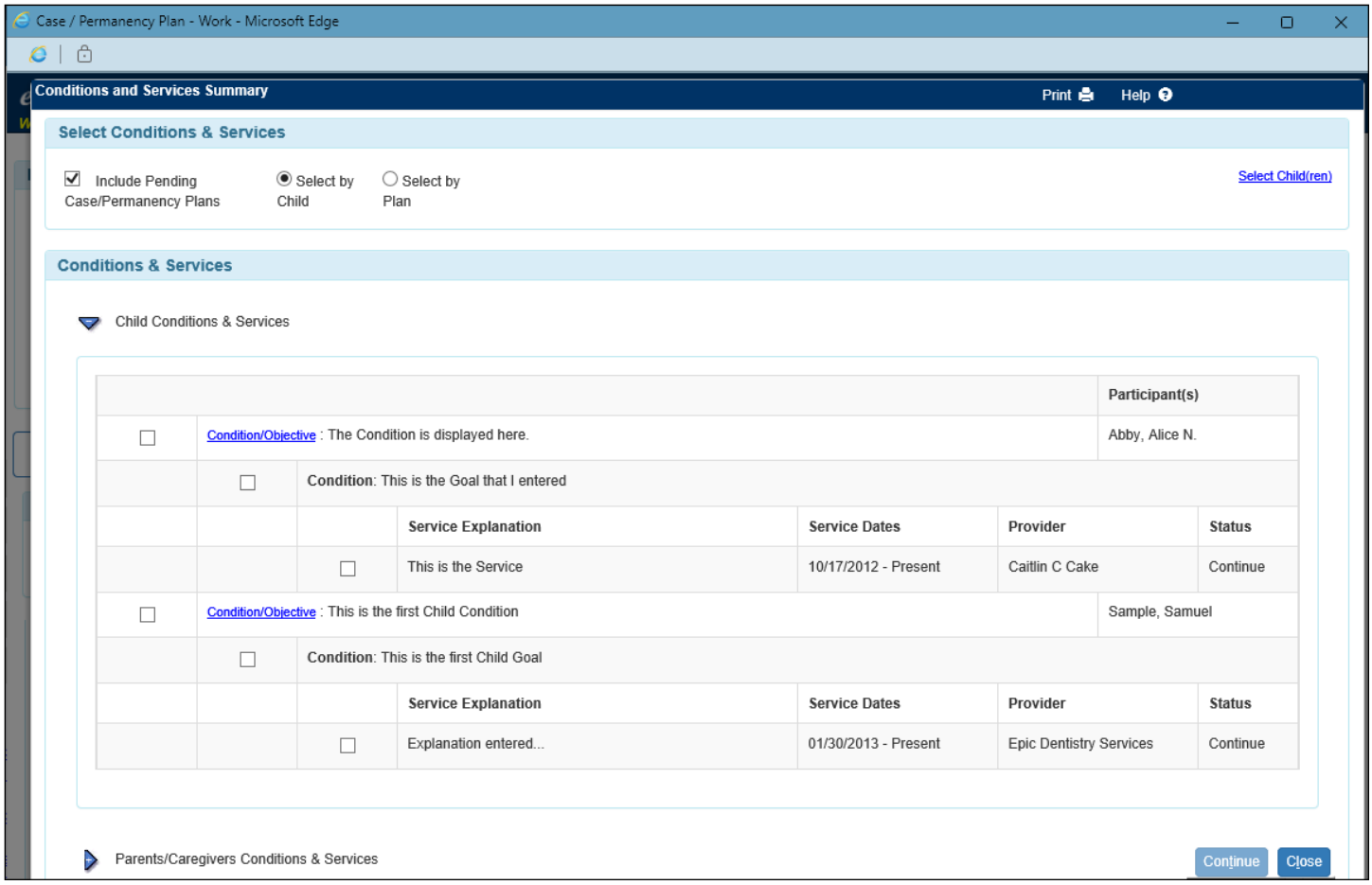
**Note:** This page will display all actionable items from the child's most recent CANS. Each of the items with an asterisk must be addressed with one or more service. All actionable items for the child (excludes the actionable items for the current caregiver and primary identified permanent resource) must be addressed/considered to approve the Permanency Plan.



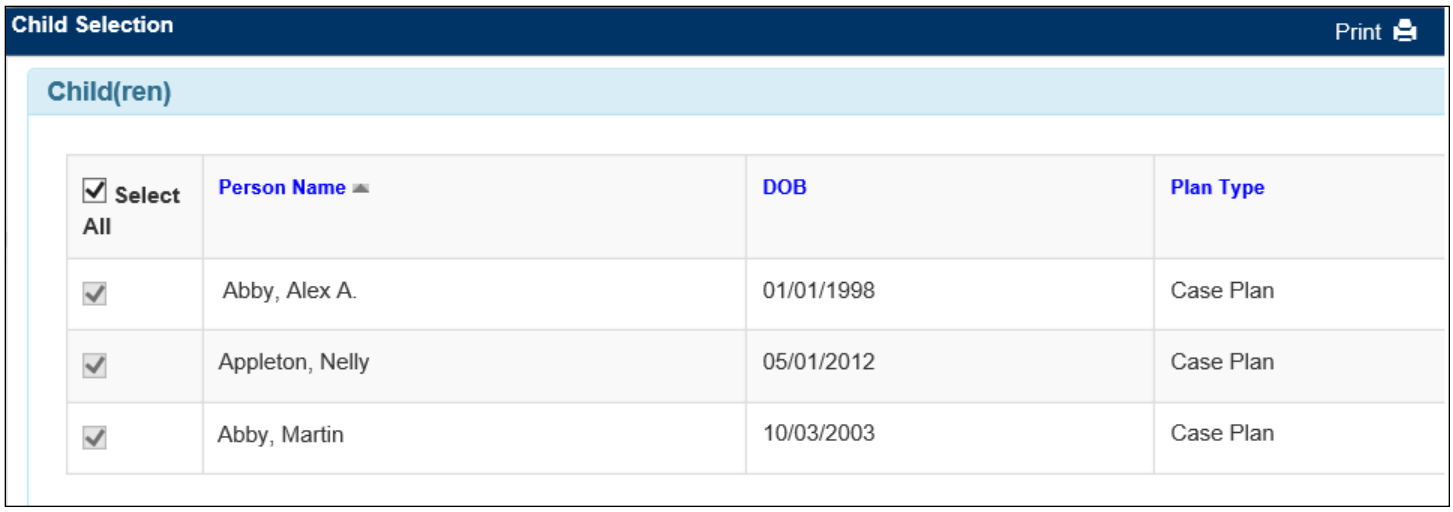

7. Each Condition can have multiple services. Click Insert Service to add more services for a Condition. Multiple Conditions can be added by clicking Insert Condition. The same radio button choice will be selected for each Condition inserted.

8. To Import previous Conditions and Services for this Case, click the Import button.

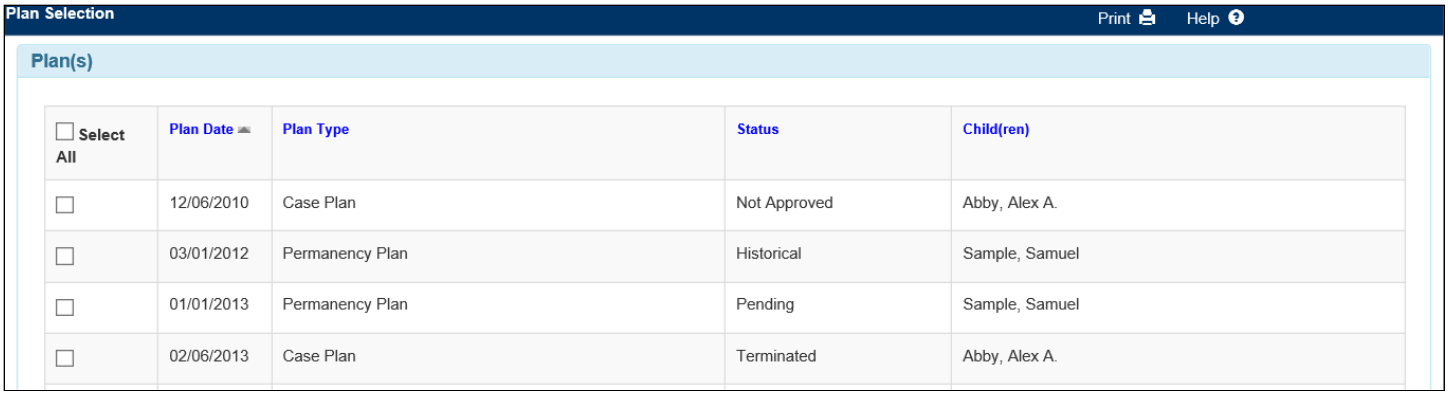
    a. Check or uncheck the Include Pending Case/Permanency Plans checkbox to include or exclude pending plans.
    b. Select either by Child or by Plan radio buttons to modify the Conditions & Services results.




4. 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.




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




6. The Condition & 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 Case/Permanency Plan page, the selected Conditions/Objectives, Conditions and Services will appear under the corresponding Conditions & Services Section.

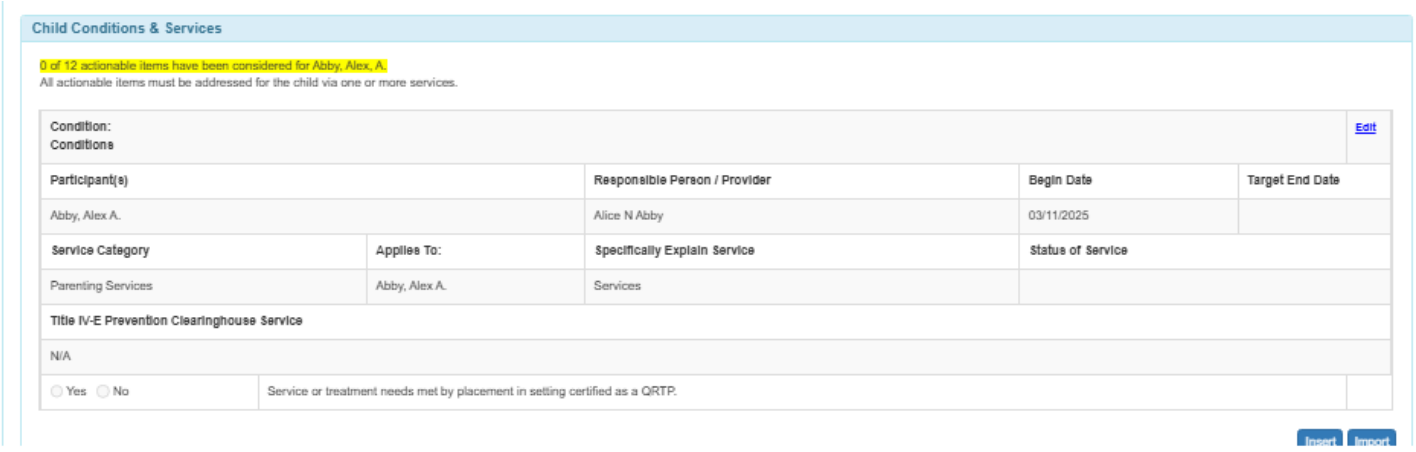
**Note:** Checking the box for a Service will automatically check the box for the associated Condition and Condition/Objective.

9. To delete a Condition or Service, click the Delete hyperlink next to the Condition or Service that should be deleted.

10. Conditions and Services entered and imported can be reviewed from the Child's Well-Being tab.

11. Click the Edit hyperlink to edit any of the conditions as appropriate.

**Note:** Any imported Conditions and Service will need to be updated with the selection of a radio button to be able to modify any of the fields.

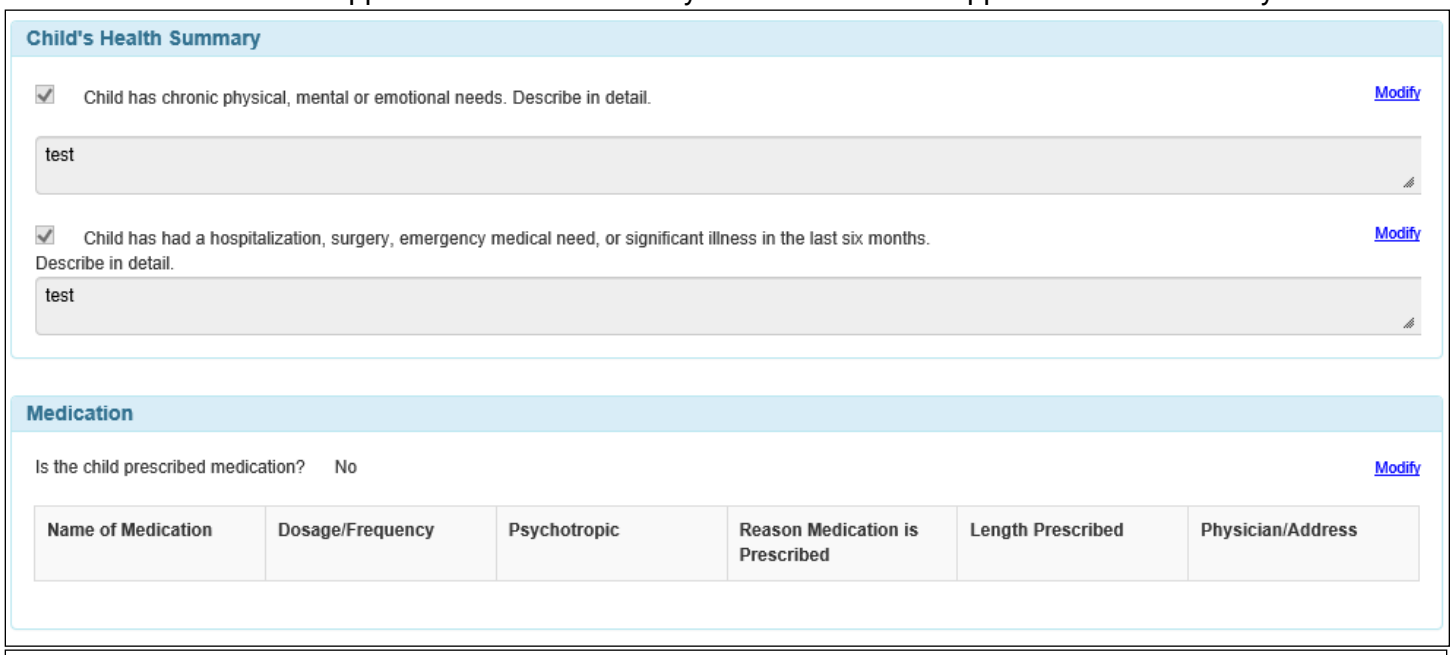


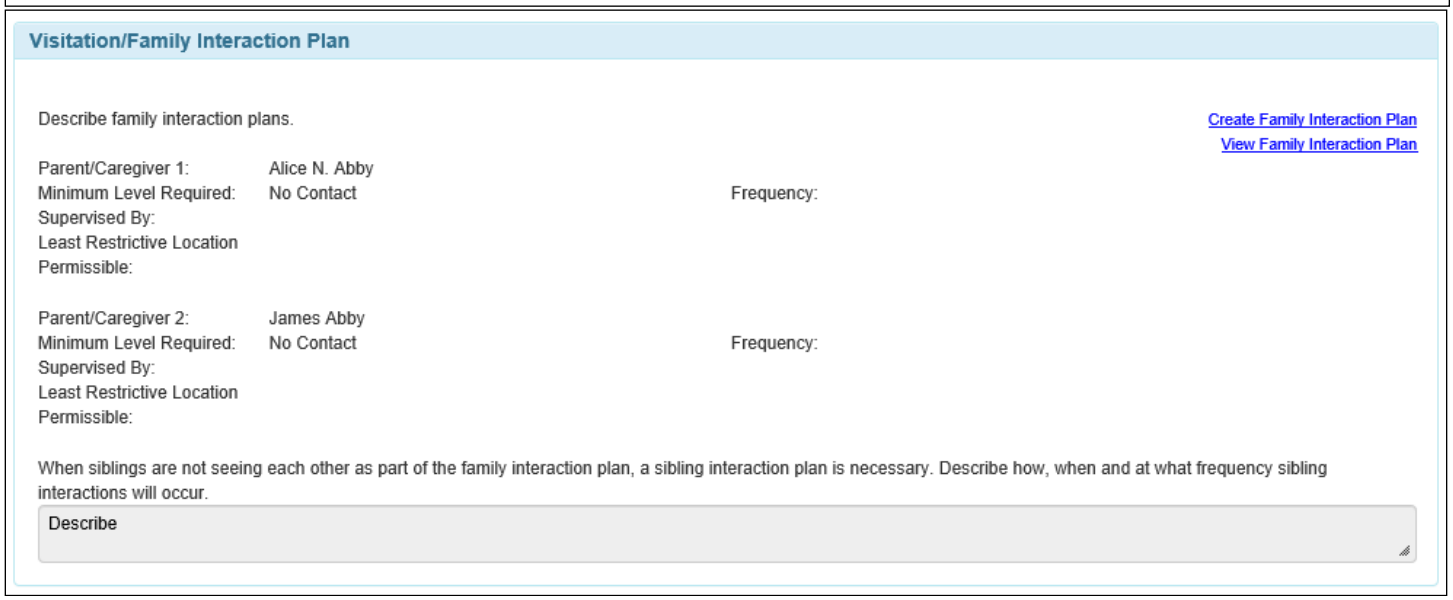

7. The Child's Health Summary, Medication, Current Health Care Providers, Immunizations sections are all prefilled from information entered on Person Management. Click the Modify hyperlink in any of the sections to review and update information when applicable.

8. The Educational Summary section will display additional required fields when answering "No" to "Is the most recent grade report attached?". Click the Modify hyperlink in any of the sections to review and update information when applicable.

9. The Visitation/Family Interaction Plan section will prefill with the information from the most recent Family Interaction Plan. Click the hyperlink to Create, View(when approved), or Modify the Family Interaction Plan.

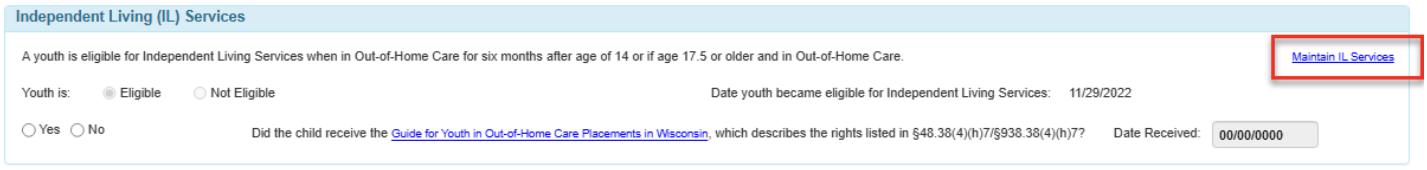
**Note:** There must be an approved associated Family Interaction Plan to approve the Permanency Plan.



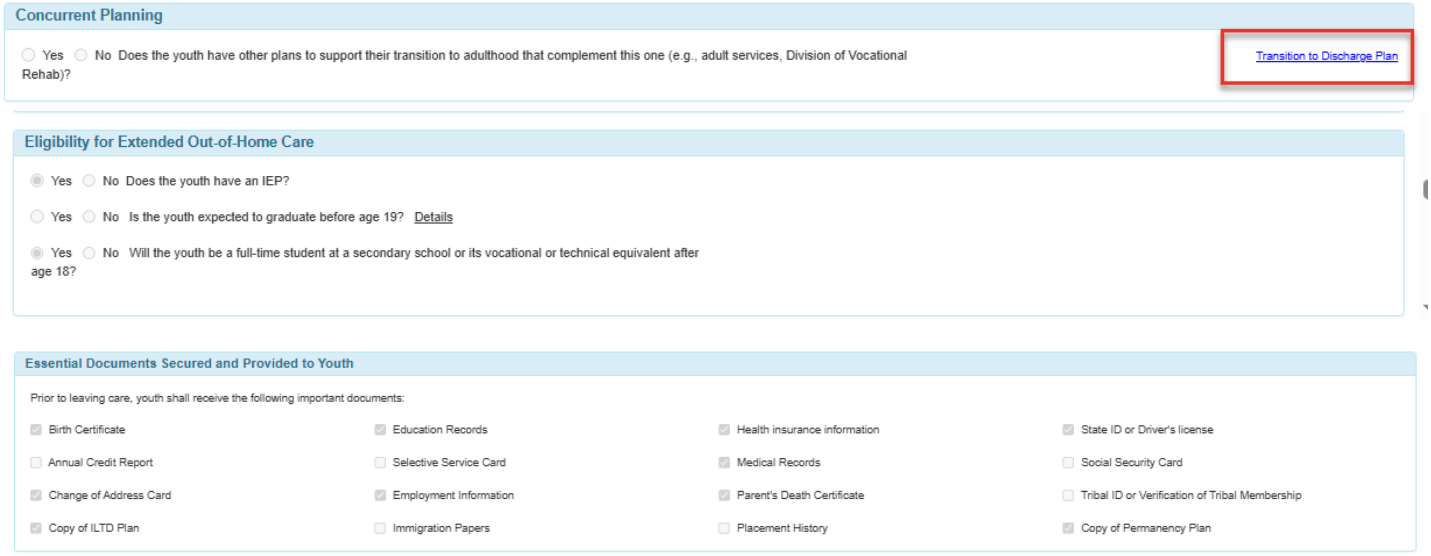

**Note:** If the Person Type for the child does not include CPS, then the eWiSACWIS version of the Family Interaction Plan is not required. If applicable, select the Non-eWiSACWIS Family Interaction Plan radio button and describe the family interaction plan.


10. In the Independent Living (IL) Services section, you can maintain the services by selecting the Maintain IL Services hyperlink. See the Independent Living user guide for more information on IL.

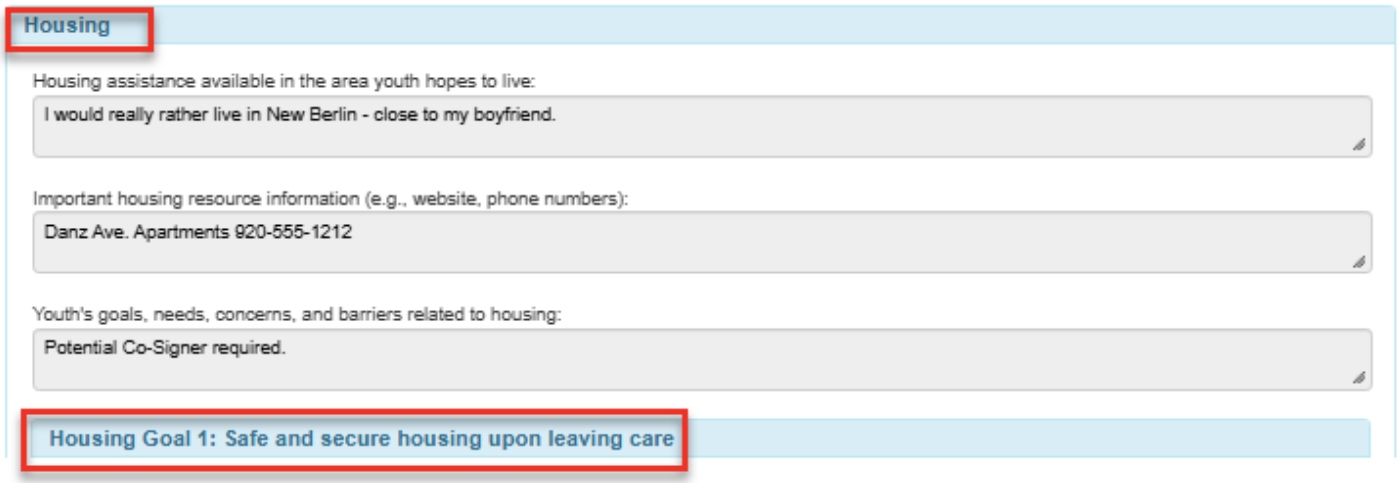


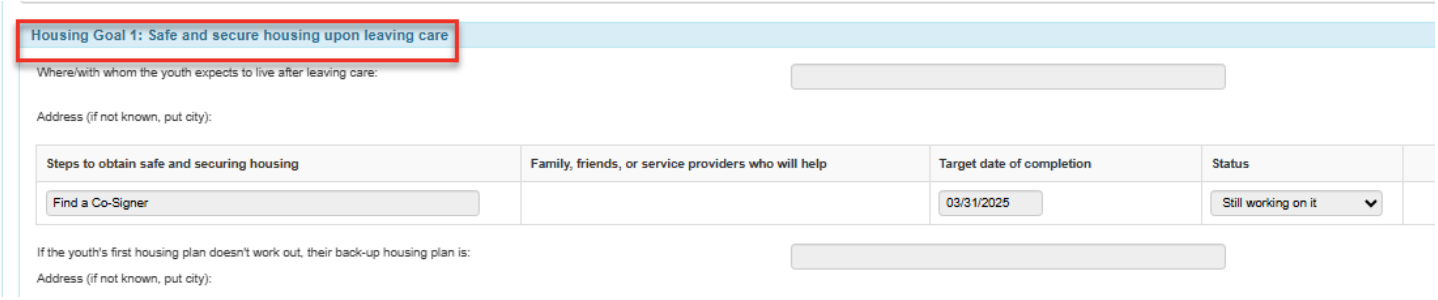

11. The Historical Services/Activities sections prefill from the independent Living page for the youth.

12. The Concurrent Planning, Eligibility for Extended Out-of-Home Care, Essential Documents Secured and Provided to the Youth sections will display if youth is IL eligible and 17.5 years of age. This information prefills from the Independent Living page and can be updated by selecting the Transition to Discharge hyperlink.




13. Additionally, there will be multiple group boxes and fields prefilling from the Independent Living page. Housing, Employment, Income and Finances, Education, Health and Well-being, Transportation, Community and Support Network, and Other Areas of Need group box sections will display prefilled information as documented on the Independent Living page once the youth is IL eligible and 17.5 years of age. In each section, depending on the youth's goals and what is documented on the Independent Living page, will display the goals selected by the youth, and steps to achieve those goals. These are dynamically displayed based on the youth's selection from the Independent Living page.

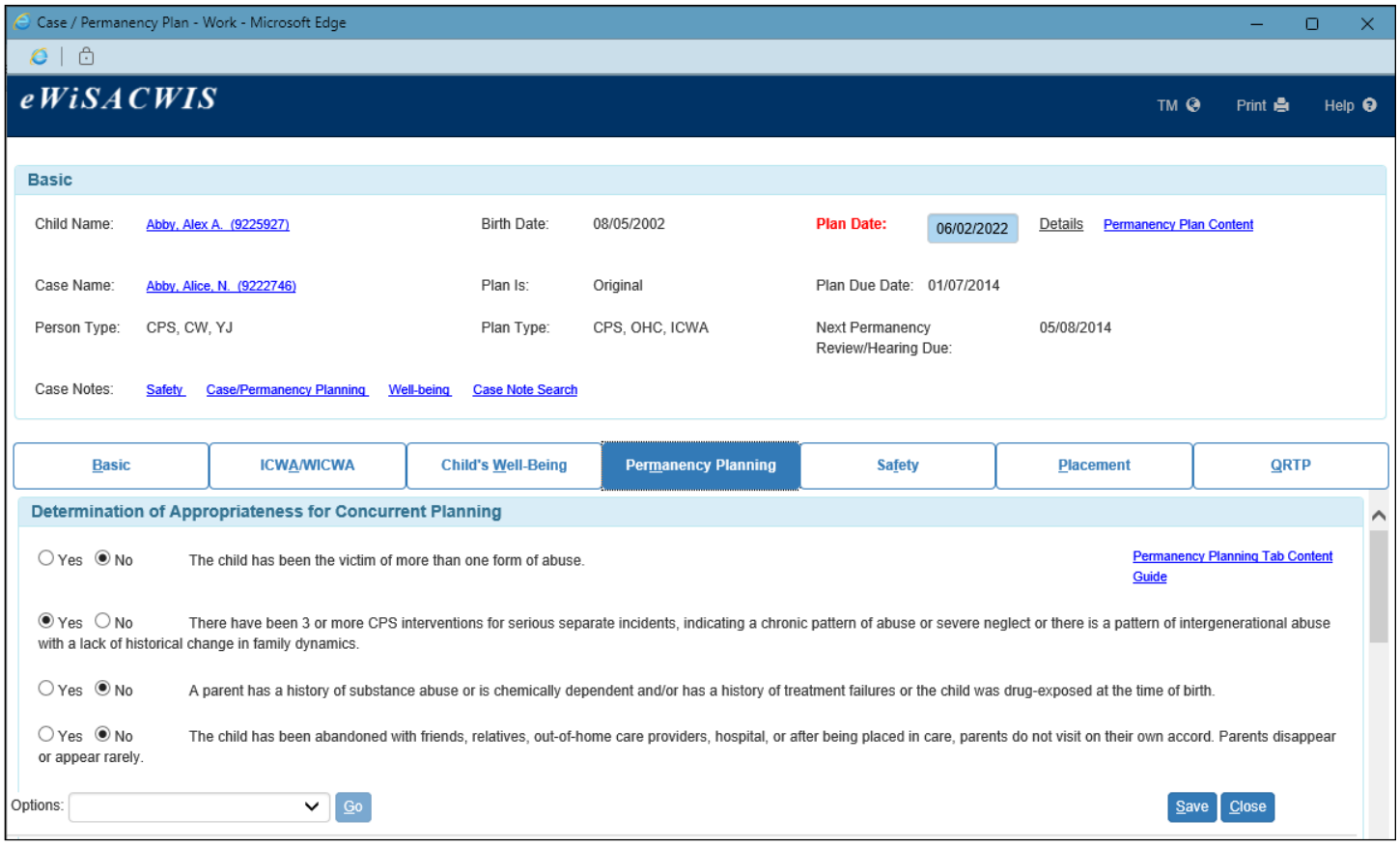





The Permanency Planning tab contains the Determination of Appropriateness for Concurrent Planning, Proposed Permanence Goal, Permanence Goal, Concurrent Goal, Parents/Caregivers Conditions & Services, Reasonable Efforts, Termination of Parental Rights, ASFA Exceptions, Permanency Review, and the Permanency Hearing sections.

1. Click the Permanency Planning Tab Content Guide hyperlink for more information on how to fill in the information on this tab.

2. Some information will prefill on this tab. Fill out the remaining required fields and save the plan.

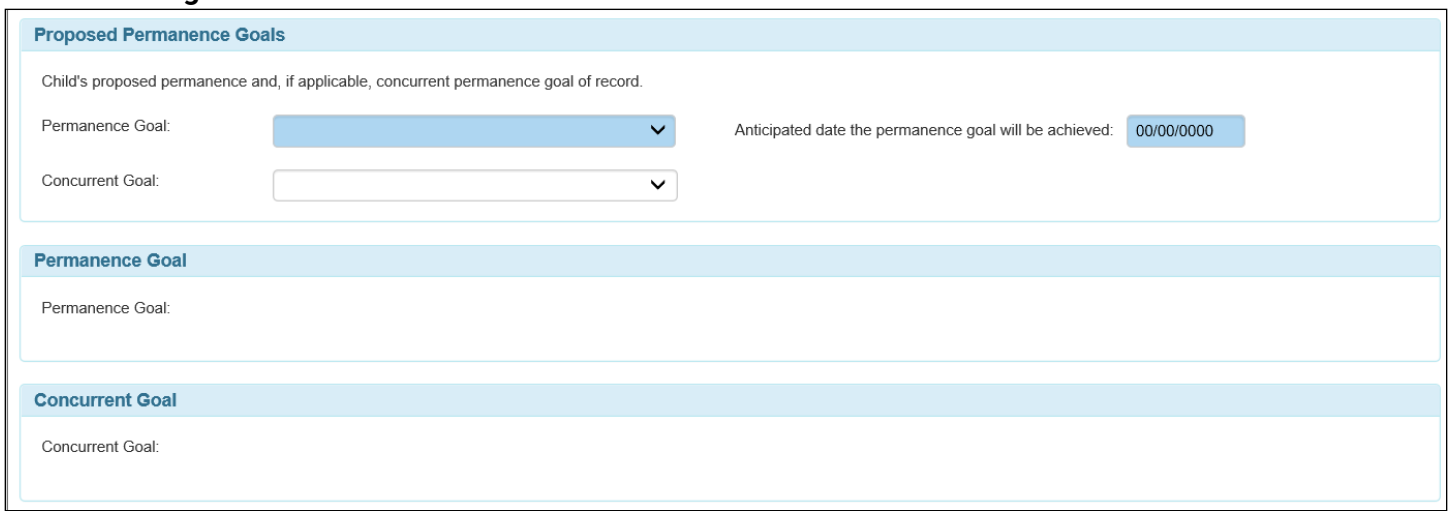



3. If this is a Subsequent plan, select the Permanence Goal from the dropdown in the Current Permanence Goal of Record section. If applicable, select the Concurrent Goal.

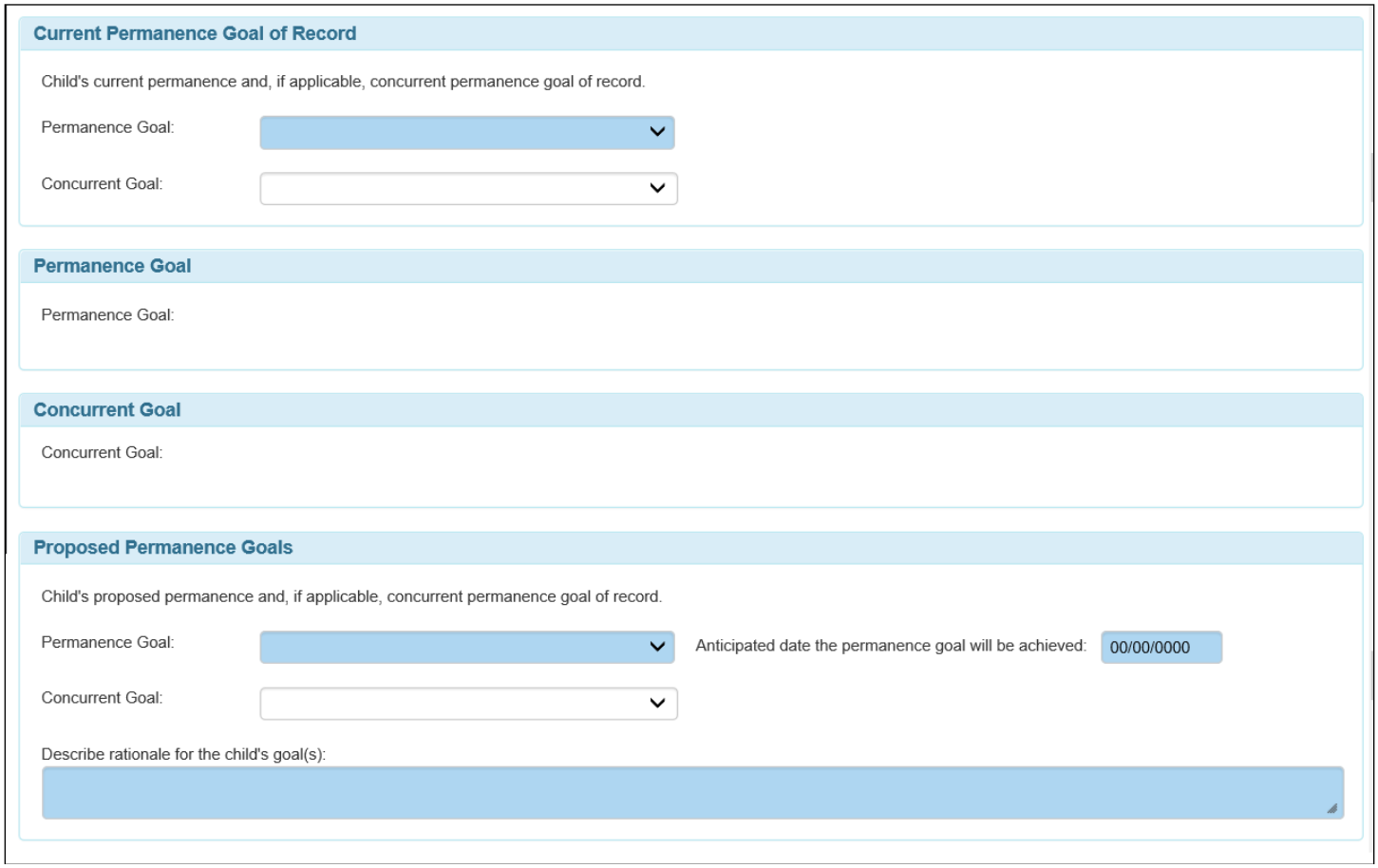
**Note:** If the plan is the Original plan, there will be only a Proposed Permanence Conditions section. In the Permanence Goal and Concurrent Goal sections, the set of questions will vary, depending upon which goal was selected in the Current Permanence Goal of Record section. Document a response to each of the questions. If applicable, select the appropriate radio button for the question(s).

4. In the Proposed Permanence Conditions section, select the Permanence Goal from the dropdown and document the anticipated date the permanence goal will be achieved. Describe the rationale for the child's goal(s).

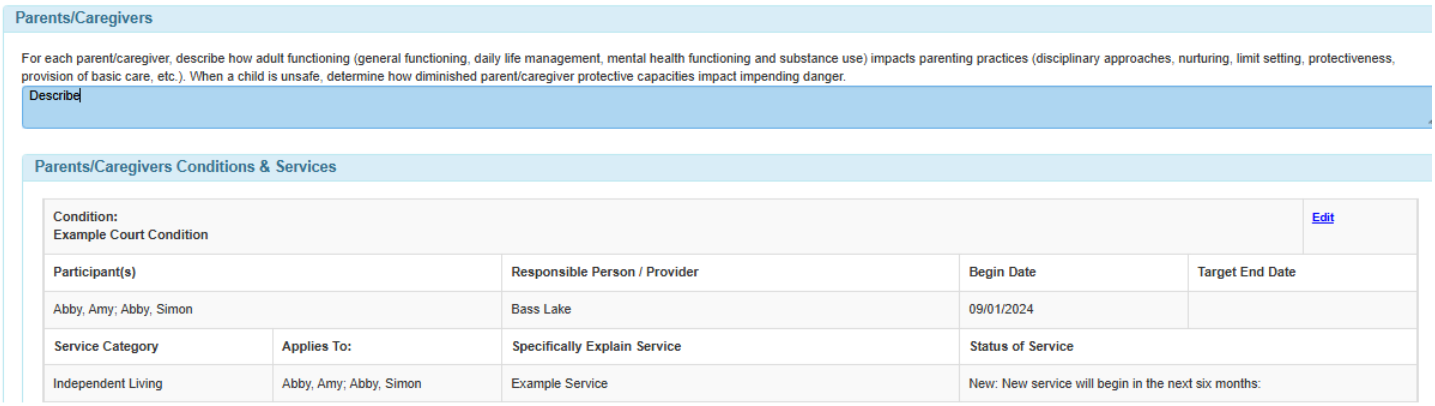
**View of Original:**




**View of Subsequent:**



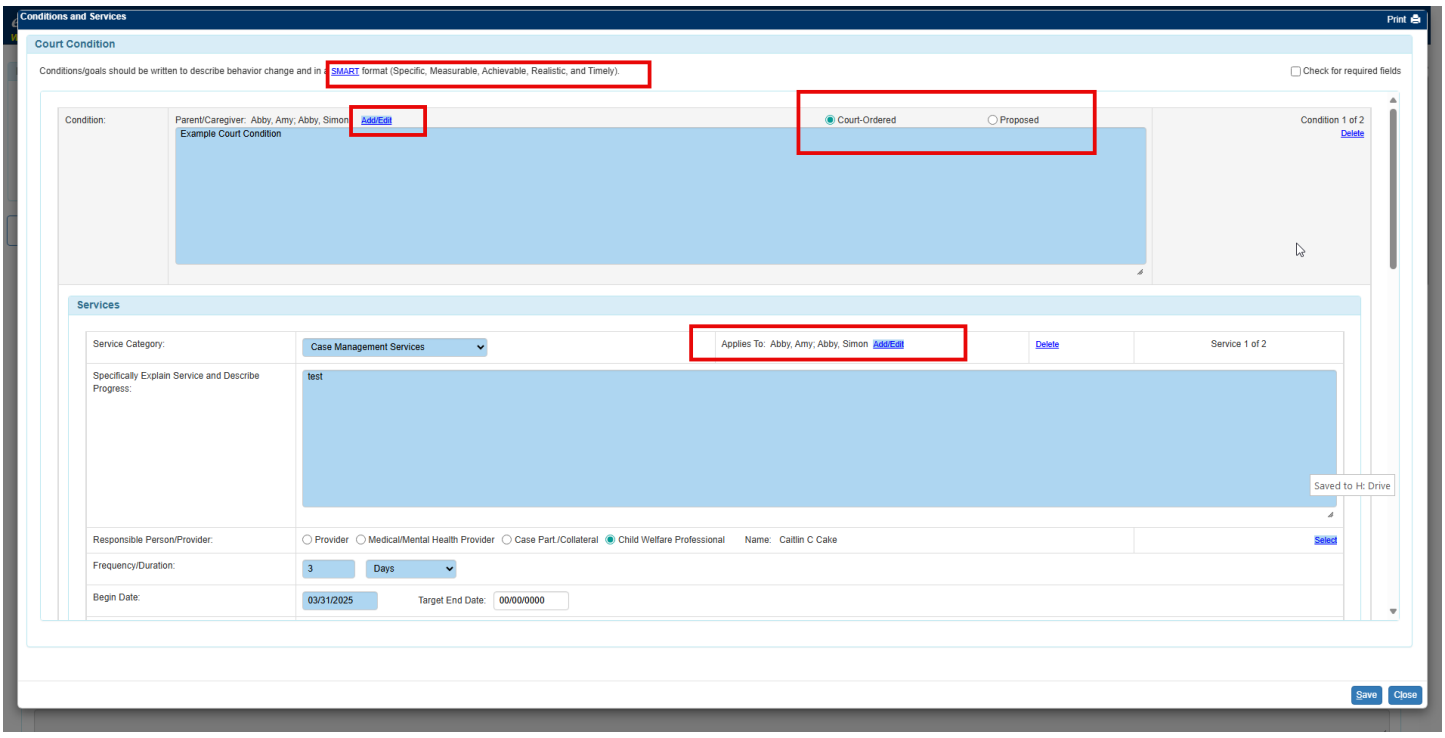

5. The Parents/Caregivers section narrative will prefill information from the most recent pending or approved Assessment. This narrative box is enabled to enter additional information if needed.



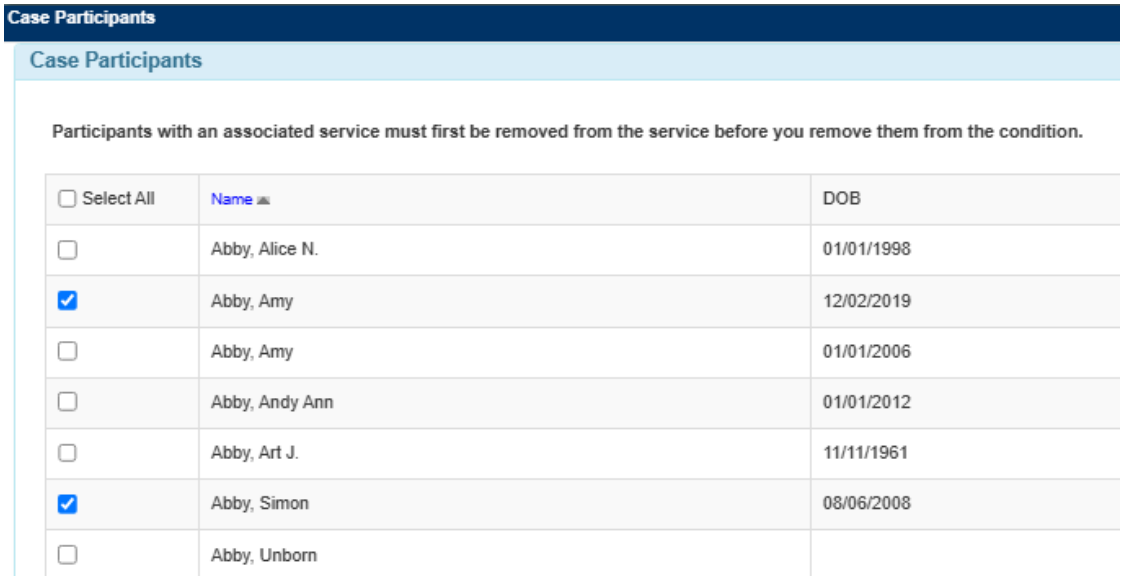

6. In the Parents/Caregivers Conditions & Services section, select the Insert button to add Conditions for the Parents/Caregivers. This will open the Conditions and Services page.

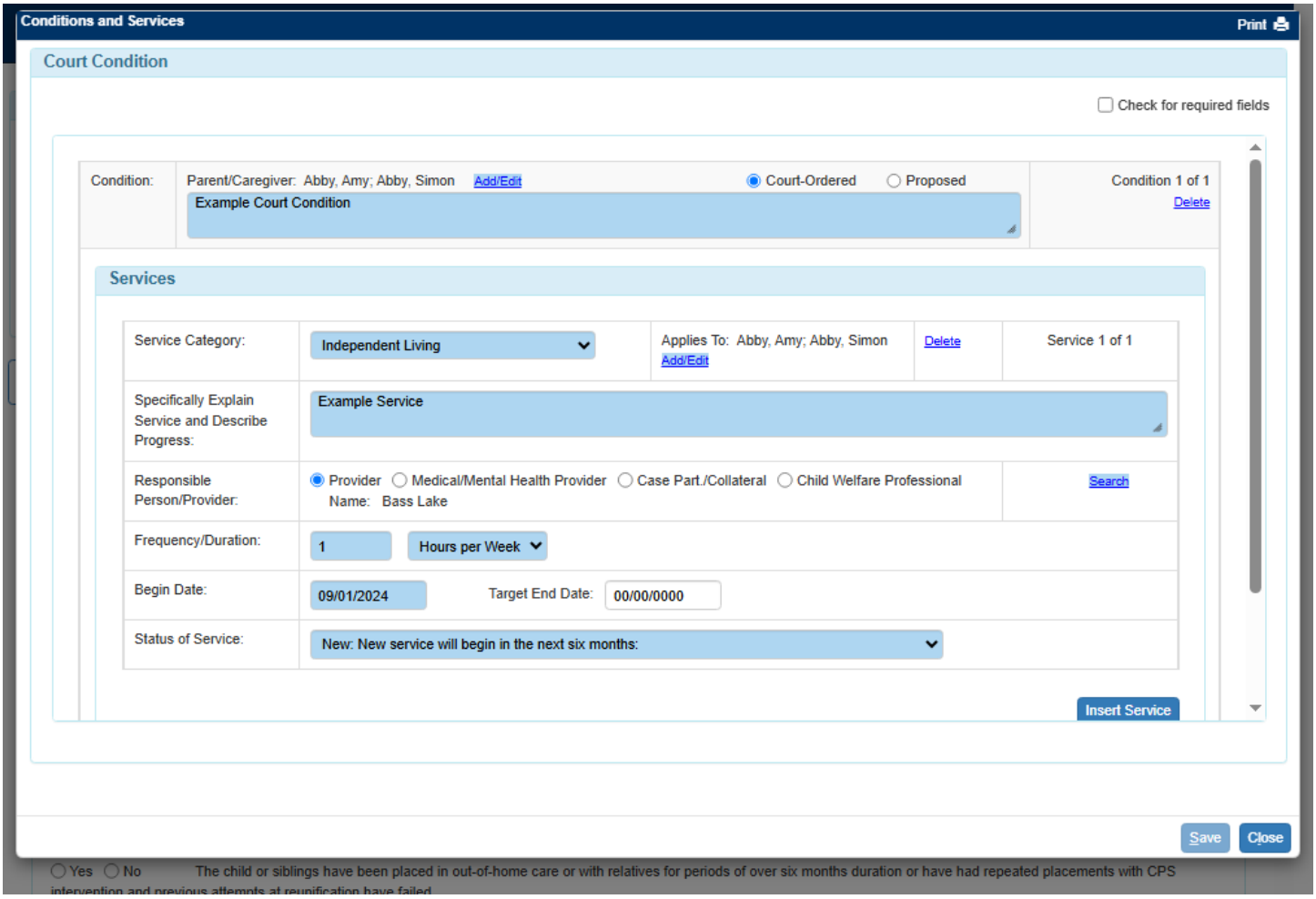
   **Note**: Complete the Condition/Service details using the SMART framework (Specific, Measurable, Actionable, Realistic, and Timebound) when documenting goals for the Family Case Plan or Permanency Plan.

7. On the Conditions and Services page, click the Add/Edit hyperlink in each Condition to add the appropriate parents/caregivers these Conditions and Services are associated to. Each Condition participant will require a Service applied to that specific Condition.




8. On the Case Participants page, select the applicable parents/caregivers. Each Condition can have multiple parents/caregivers selected. Click Continue to return to the Conditions and Services page.

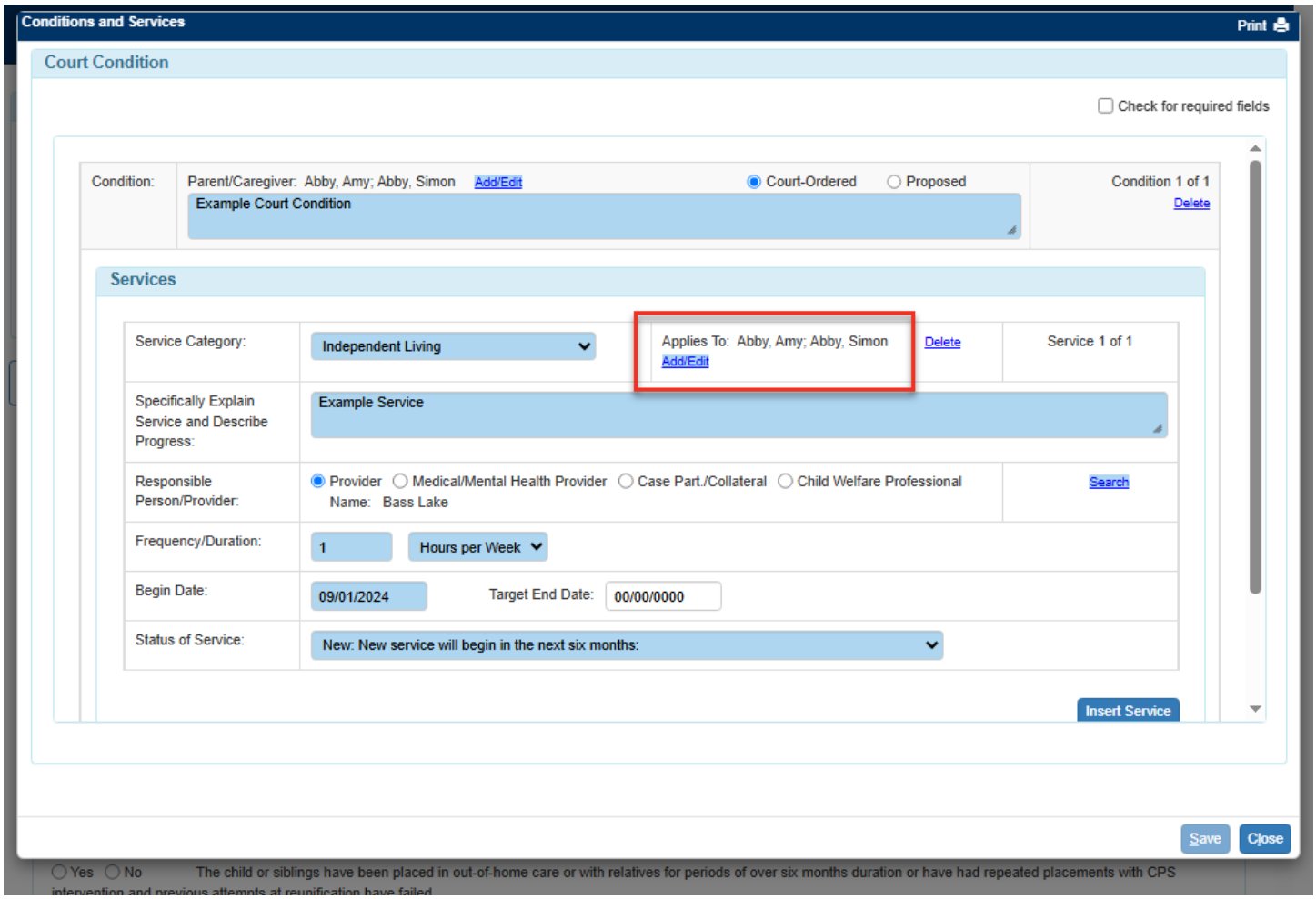


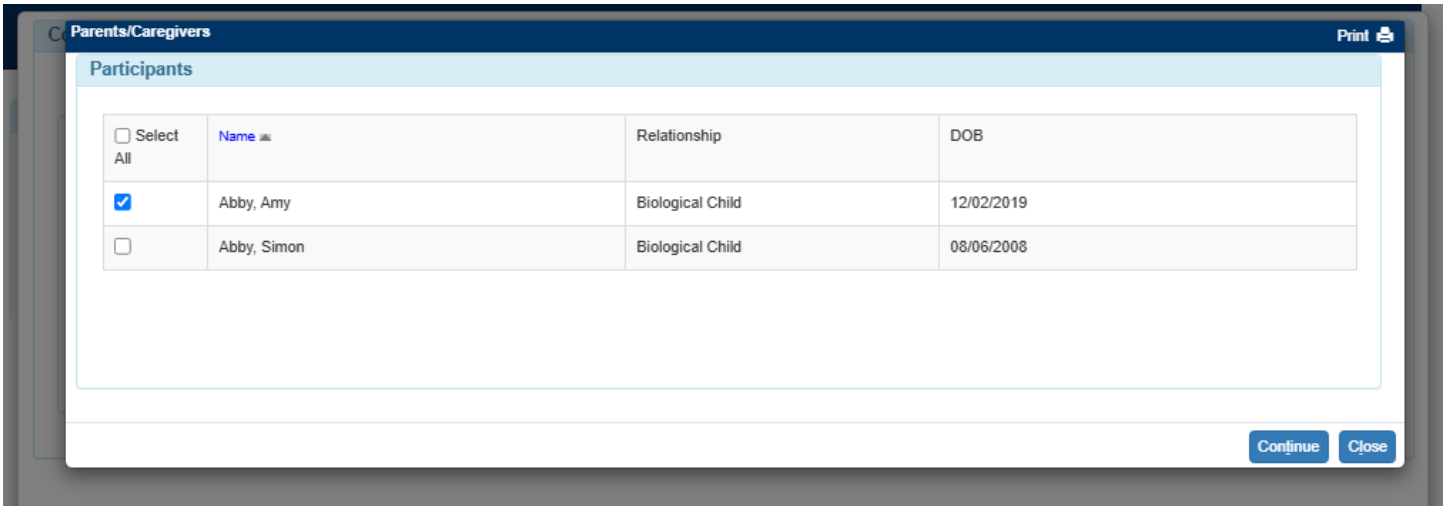




9. Select either Court Ordered or Proposed for the Condition and Service being entered. Enter the remainder of the fields. Entering the required fields on this page will be the same as Child Conditions and Services ( page 8-9 of this guide).

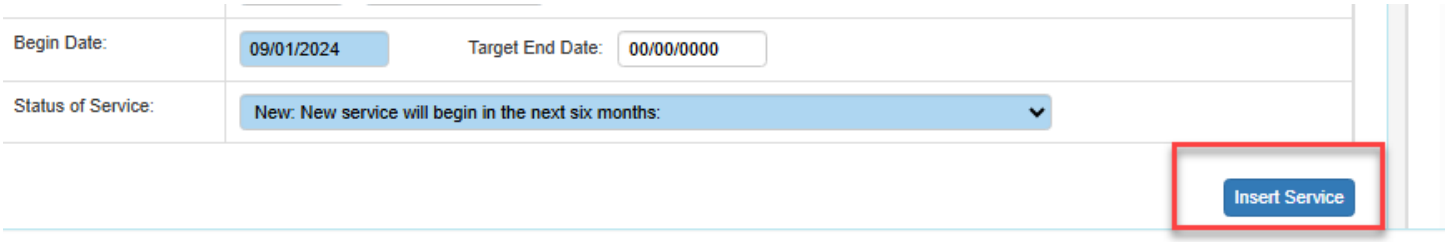
10. Each Condition participant will require a Service applied to that specific Condition. Select the Add/Edit hyperlink to add Condition participants to a Service. Multiple Services can be inserted with different

participants selected for the Applies To field, meaning there can be one Condition but different Services by Parent/Caregiver. Click the Add/Edit hyperlink in the Applies To field in the Services group box.

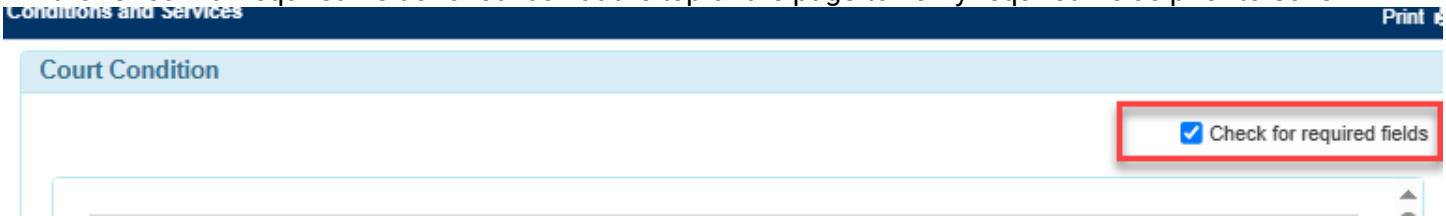


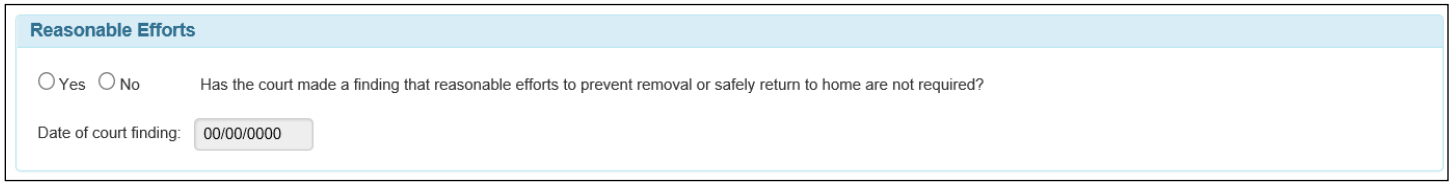

11. All participants identified on the Condition will display. Select the correct participants for which the Service applies to. If another Service is needed for a different participant, insert an additional Service on the Condition, and apply the additional Service to the other participant(s) listed for that Condition.



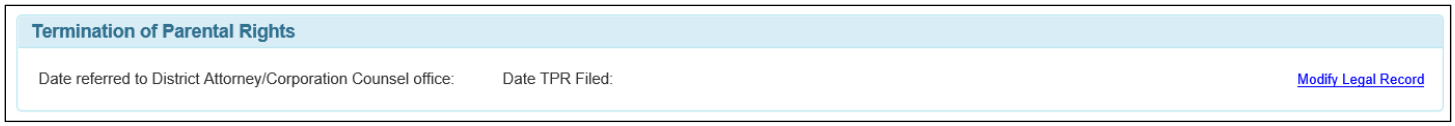

12. All fields on the Conditions and Services page when a Condition is inserted are required upon approval. Use the "Check for required fields" checkbox at the top of the page to verify required fields prior to Save.




13. In the Reasonable Efforts section, select the radio button for the question. If "Yes", enter the date of the court finding.

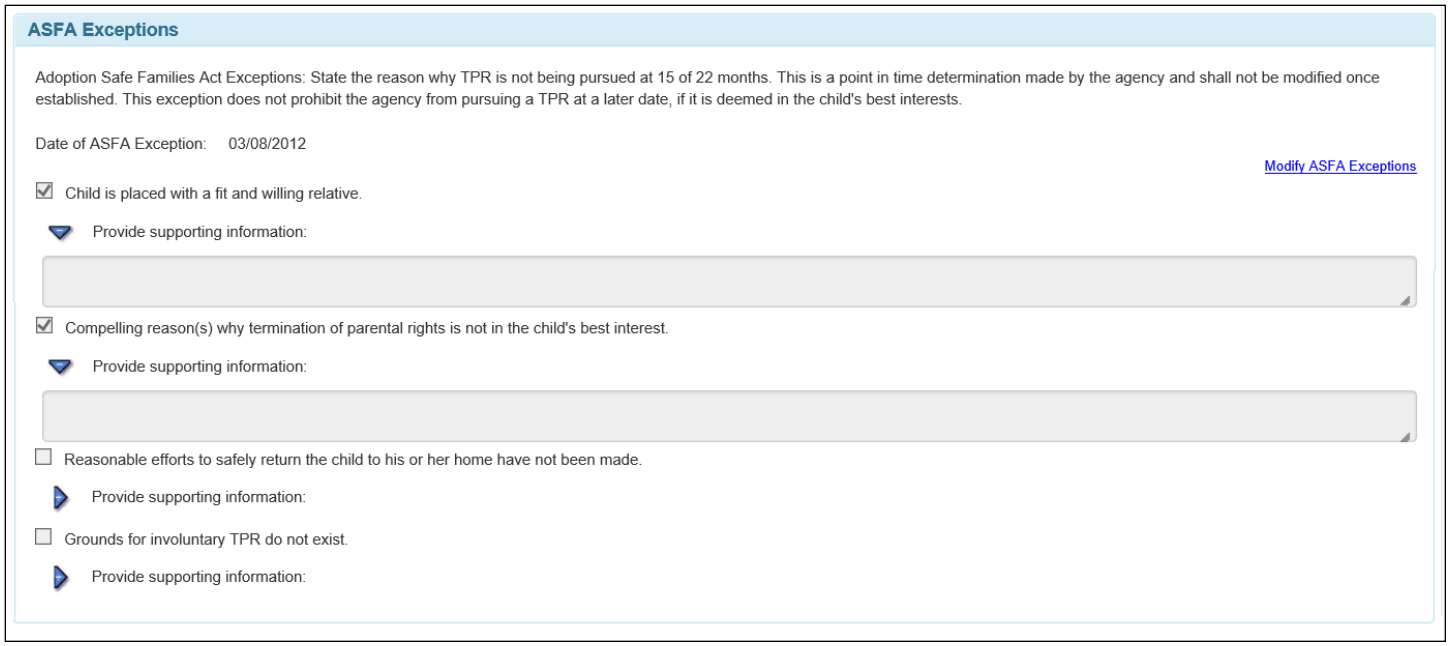



14. If a Termination of Parental Rights (TPR) has occurred, the date referred to District Attorney/Corporation Counsel and the date TPR filed will appear. You can create a Legal Record from the Create Legal Record hyperlink if the TPR does not exist.



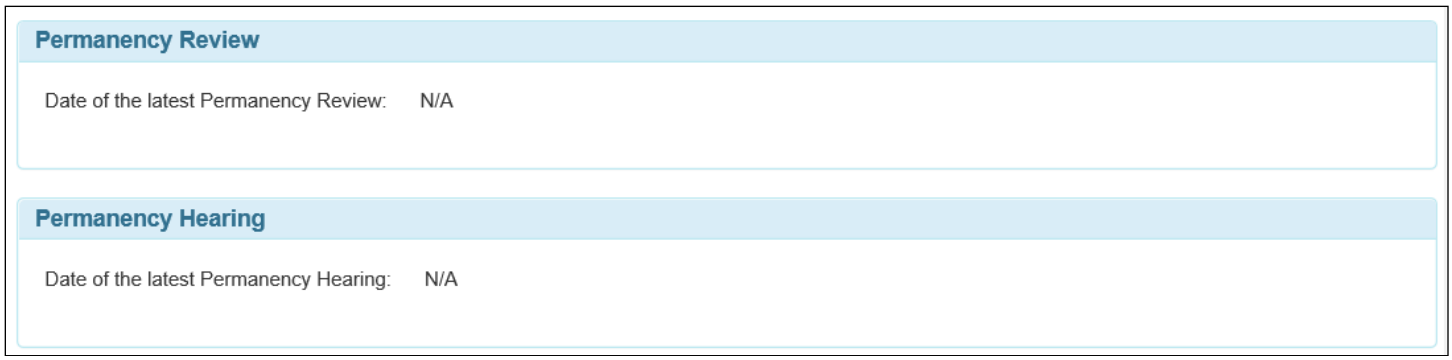

15. The ASFA Exceptions section prefills if there is an ASFA Exceptions of why TPR was not being pursued at 15 of 22 months. You can create an ASFA Exception from the Create ASFA Exceptions hyperlink if it does not exist. See the associated ASFA Exceptions User Guide to create an ASFA Exceptions.

**Note:** This is a point in time determination that is made by the agency and should not be modified once established, even if circumstances have changed.




16. The Permanency Review and Permanency Hearing sections will prefill information from the Permanency Review or Hearing Results page. If this is the original Permanency Plan, the dates will display as N/A.

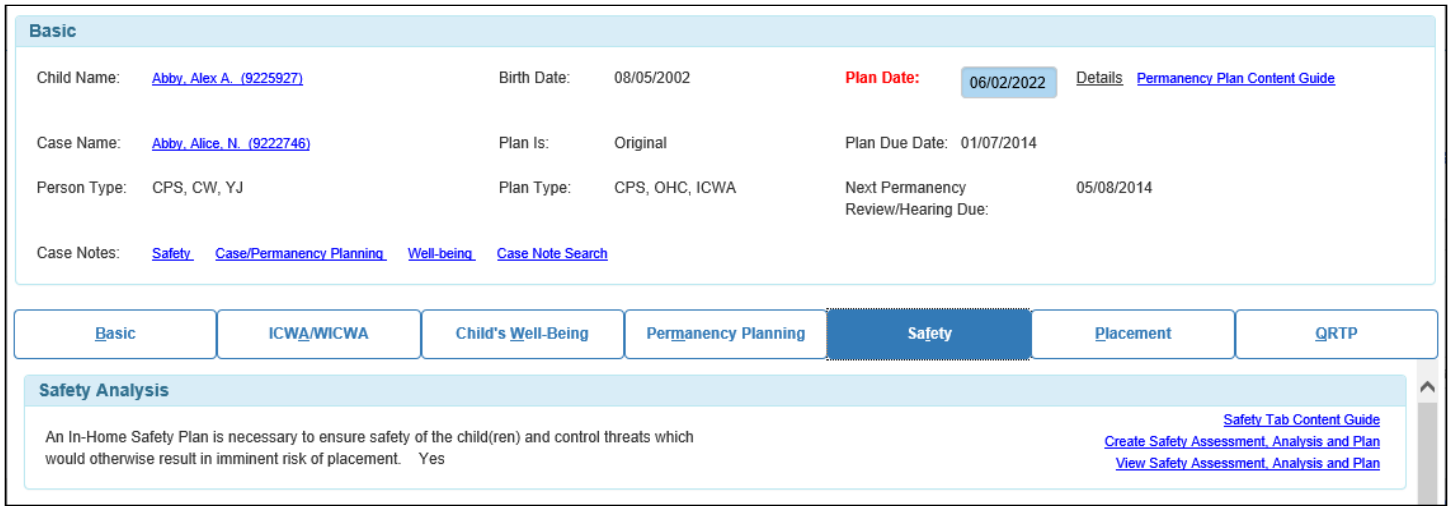
17. Enter all applicable information and click the Save button to save the plan.

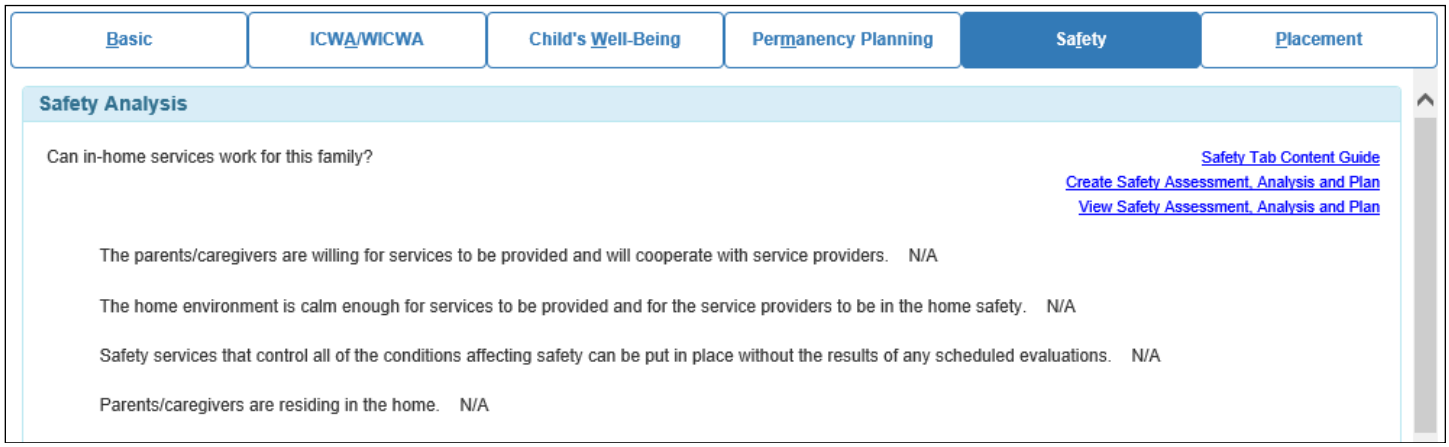



The Safety tab will display only if the person type is CPS there is any safety pieces of work documented for the child/youth. Sections are Safety Analysis, Safety Services, and Safety Decisions documented.

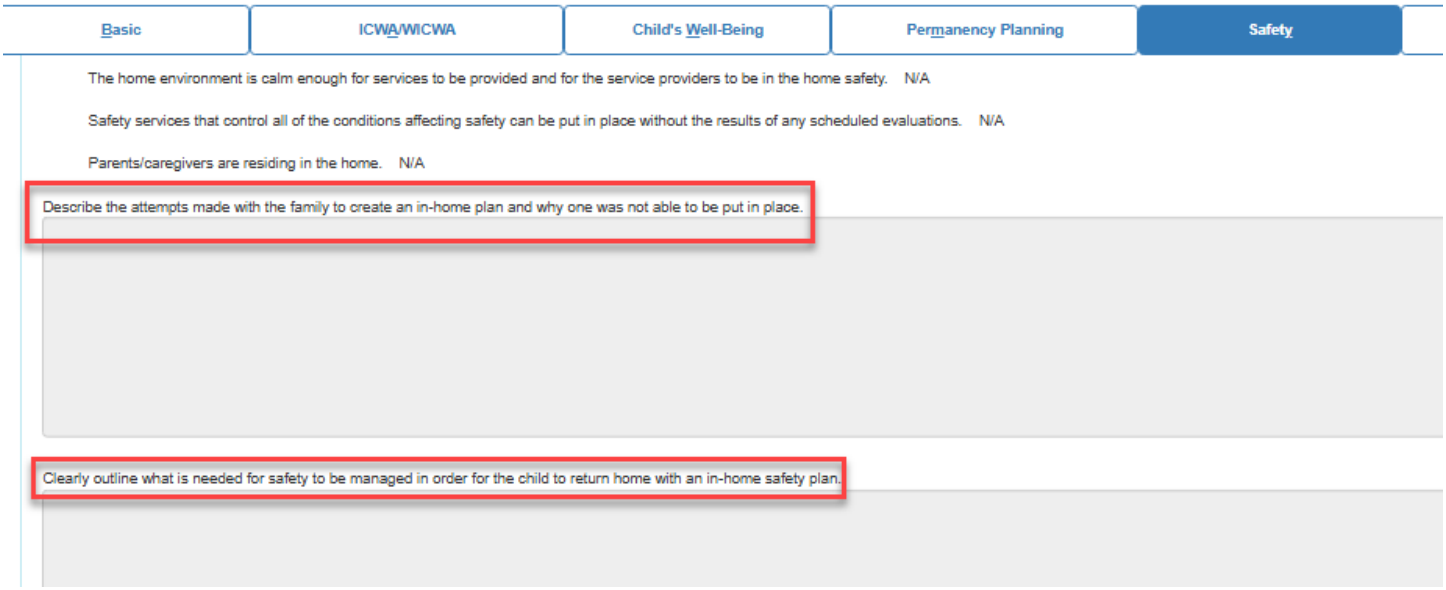
**Note:** When the Person Type is CPS, there must be an approved associated Safety Assessment, Analysis Plan to approve the Permanency Plan.

1. In the Safety Analysis section, The Safety Assessment, Analysis and Plan (SAAP) can be created, edited, or viewed using the hyperlinks. The answer to the question in this section will update based on the result of the SAAP. "Yes" or "No" will display. Click the Safety Tab Content Guide more information on how to document Safety. Based on what is documented the Safety Analysis section could look a little different. See the below 2 screen shots to compare what might be seen in this section.

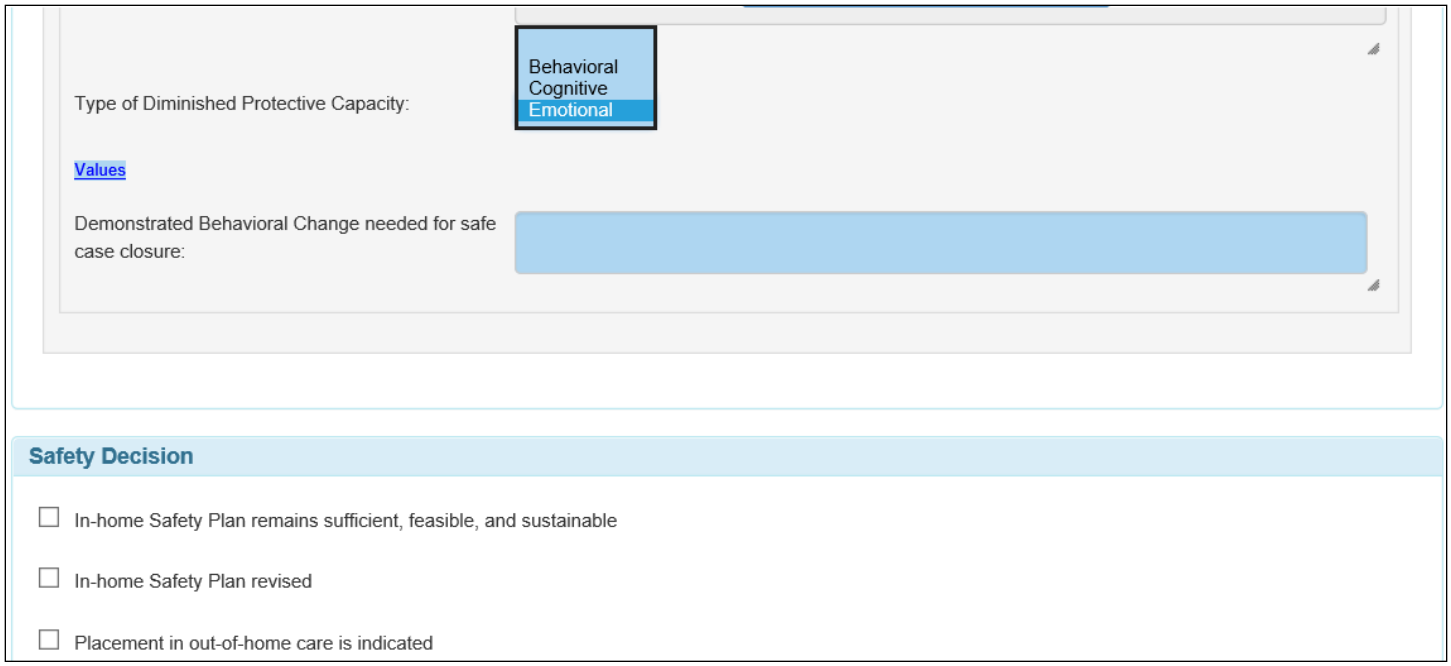


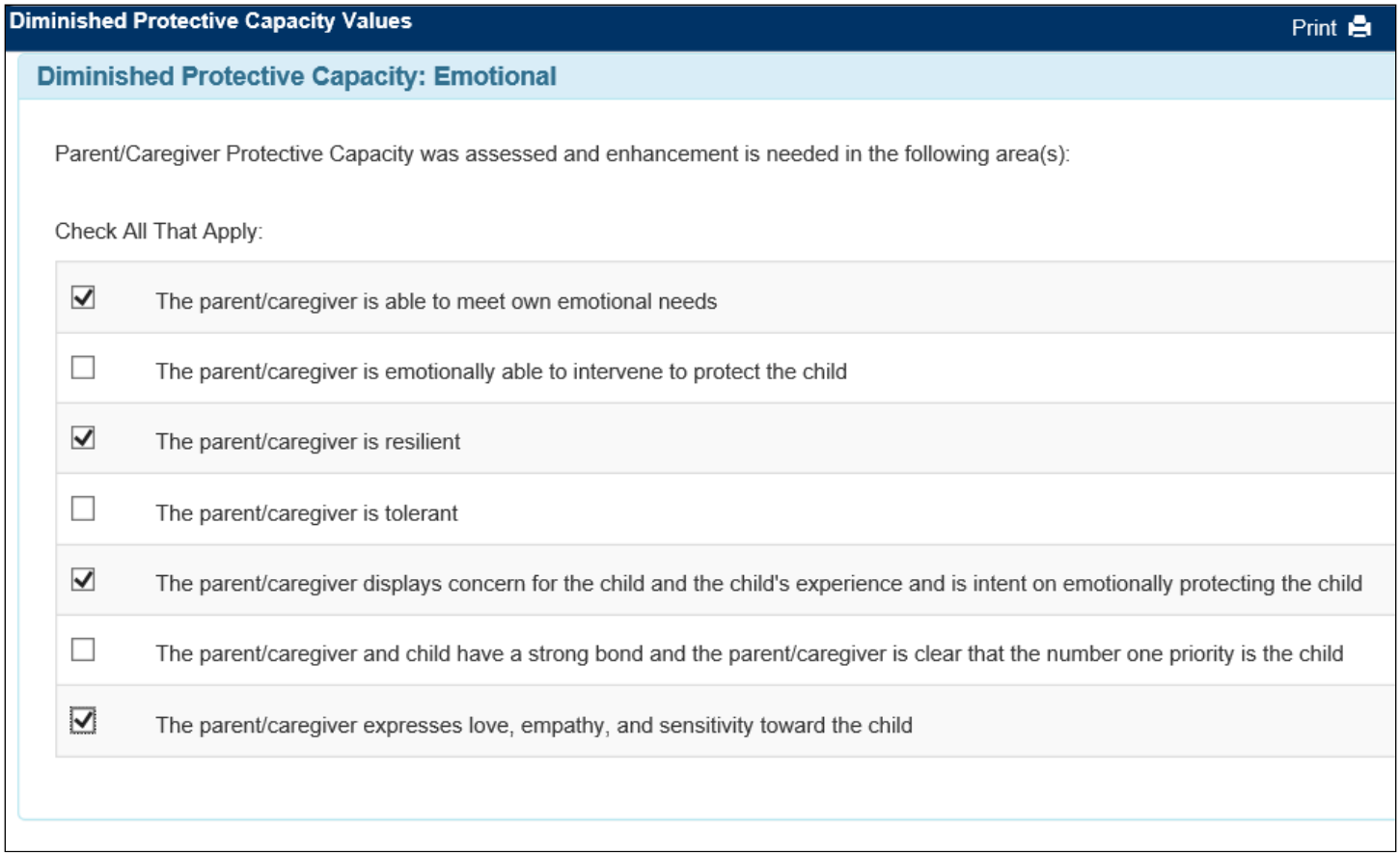

2. Two questions display and prefill from the most recent, approved SAAP if the findings are Unsafe. To update, use the Create Safety Assessment, Analysis, and Plan hyperlink to create a new SAAP.




3. If Safety Services exist, select the Type of Diminished Protective Capacity, this will automatically launch the Diminished Protective Capacity Values page. The Values hyperlink can be used to return to the Diminished Protective Capacity Values page to update selection(s).




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

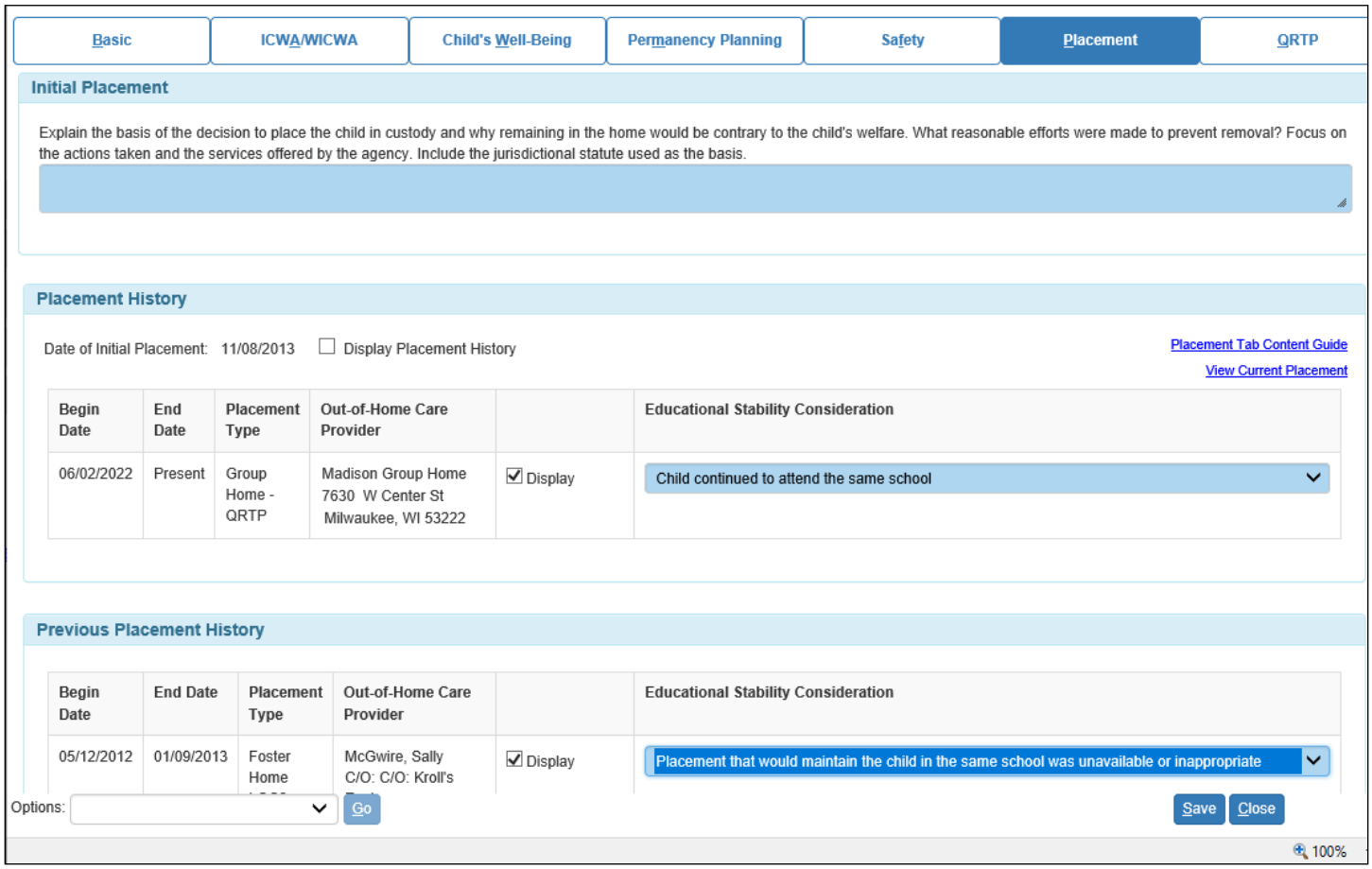



4. Document the Demonstrated Behavioral Change needed for safe case closure.

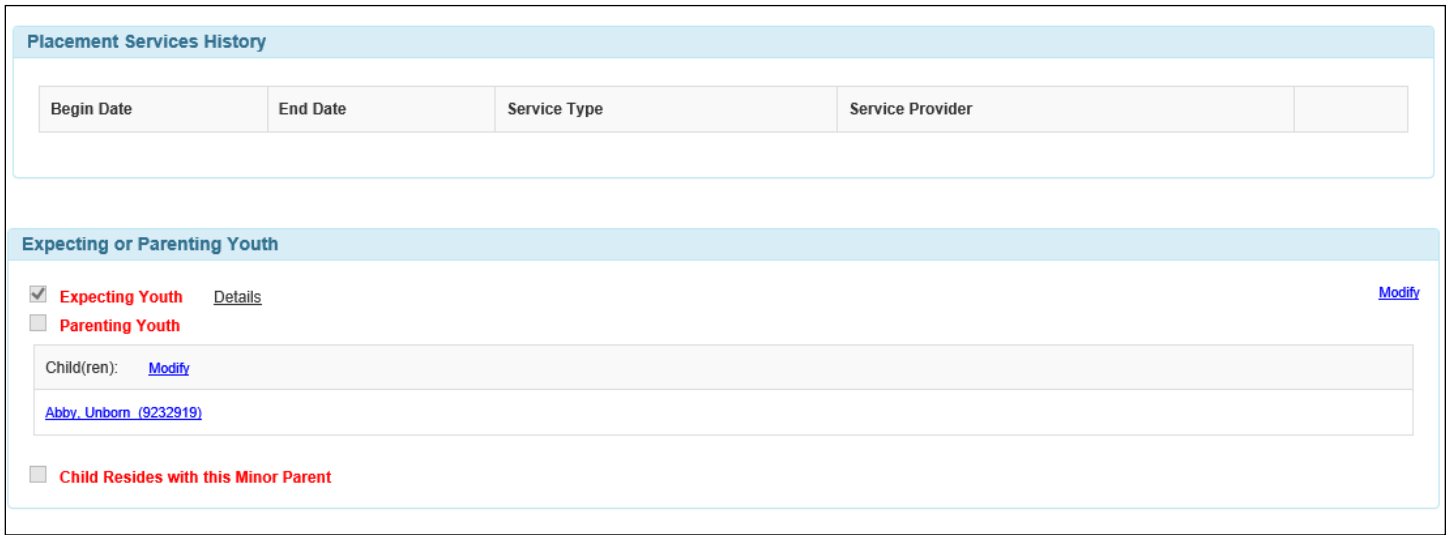
5. In the Safety Decision section, select the applicable checkboxes and save the plan.

The Placement tab. This displays all information related to the child's placement. If you uncheck the Display checkbox then this information (provider's name and address) does not display on the Permanency Plan document. Select the appropriate Educational Stability Consideration for each Out of Home Placement.

1. If your agency's service types indicate "Prefill Documents," then any applicable Services will prefill in the Placement Services History section.

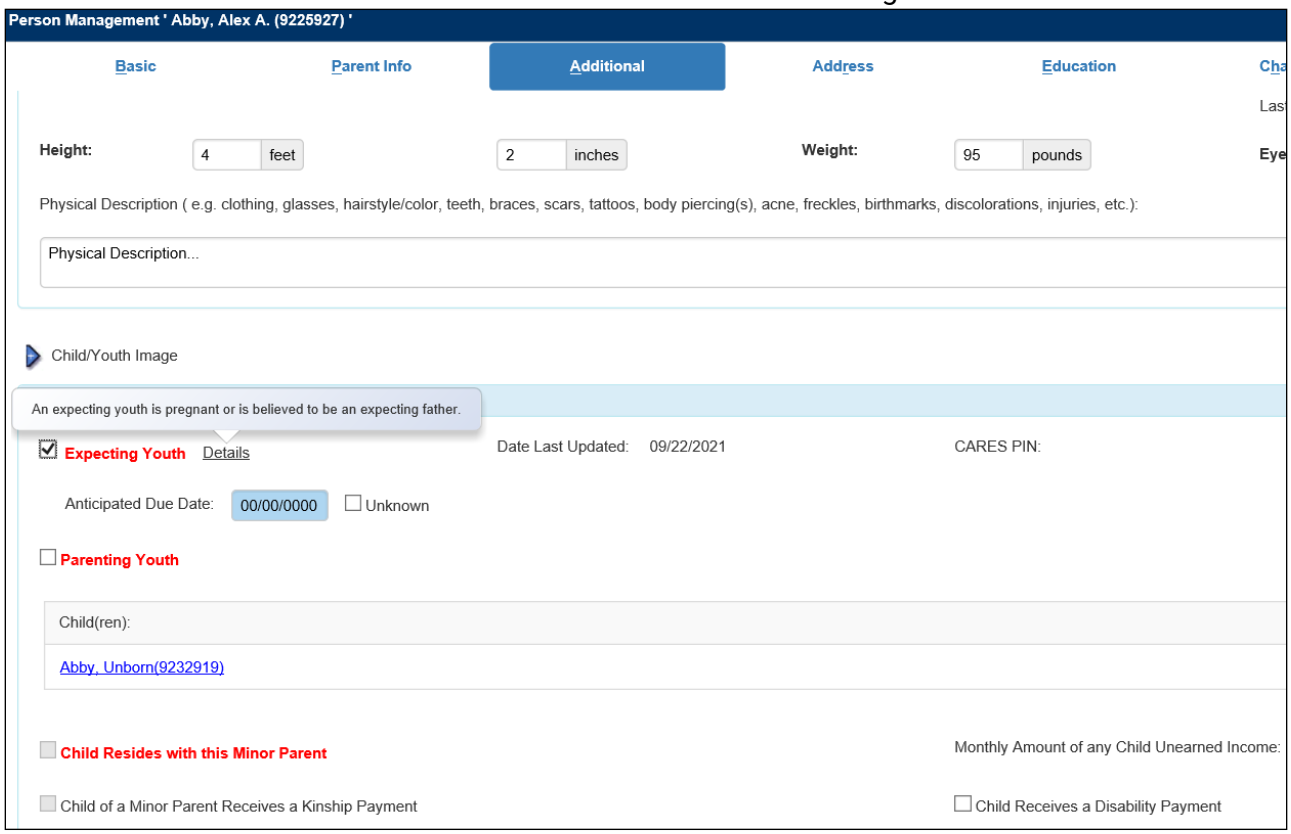



6. The Expectant or Parenting Youth section is prefilled from the Person Management page. To Modify this information, click the Modify hyperlink on the top right.



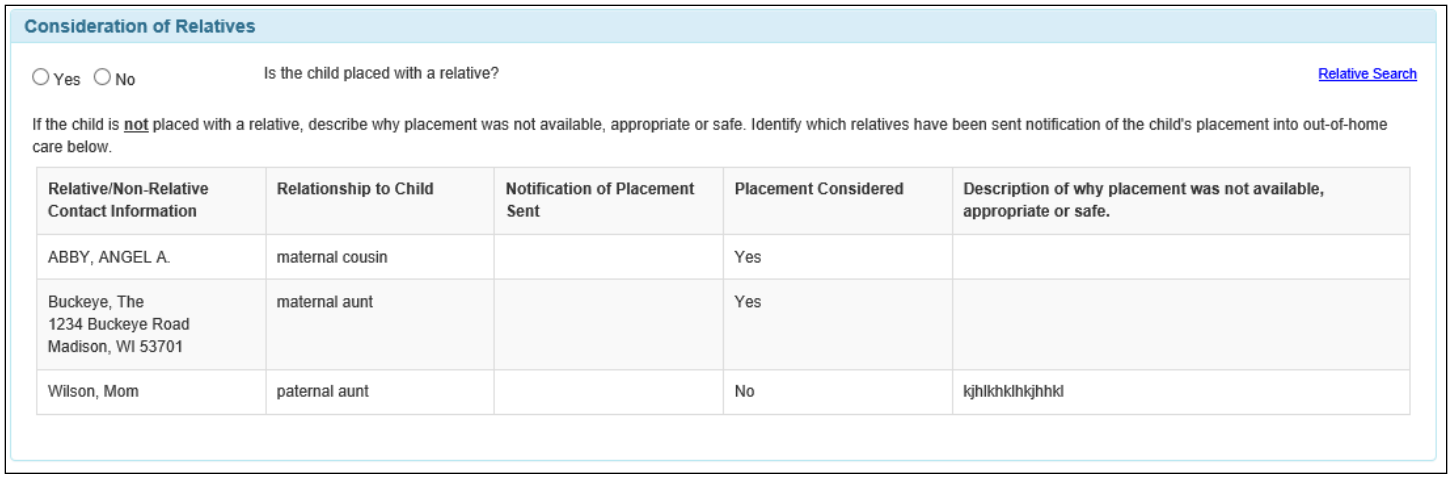
7. Expecting Youth should be checked for an expecting mother or father. Once checked, the Anticipated Due Date will be required. If the date is unknown, check the Unknown checkbox. A reminder will be sent to the primary worker update the Anticipated Due Date once known.

    a. Child Resides with this Minor Parent becomes enabled what the Parenting Youth checkbox is checked. To document the Child(ren) section in Person Management, the youth on the plan must be documented as a Parent on a child's Person Management record.




8. Save and Close Person Management to review the changes made reflected on the Placement tab.

9. In the Consideration of Relatives section, select the "Yes" or "No" radio button to indicate if the child is placed with a relative. If no relatives are documented on the Relative/Non-Relative Search Summary page for the child, answer the question, "If a relative could not be located, describe subsequent/current efforts made to locate a relative." To add any relatives, click on the Relative Search hyperlink. See the associated Relative/Non-Relative Search User Guide. If the Relative/Non-Relative Search Summary page contains any relatives, the relative section will display the relatives. If indicated '"Yes"' the child is placed with a relative, at least one relative must be documented on relative search.



**Consideration of Relatives**

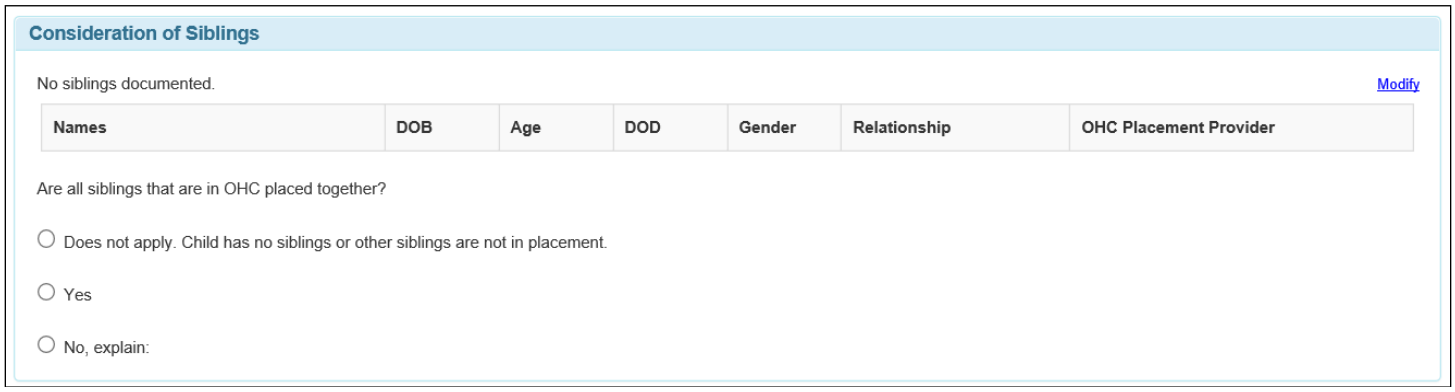
○ Yes ○ No  Is the child placed with a relative?  Relative Search

If the child is **not** placed with a relative, describe why placement was not available, appropriate or safe. Identify which relatives have been sent notification of the child's placement into out-of-home care below.

| Relative/Non-Relative Contact Information | Relationship to Child | Notification of Placement Sent | Placement Considered | Description of why placement was not available, appropriate or safe. |
|---|---|---|---|---|
| ABBY, ANGEL A. | maternal cousin | | Yes | |
| Buckeye, The<br>1234 Buckeye Road<br>Madison, WI 53701 | maternal aunt | | Yes | |
| Wilson, Mom | paternal aunt | | No | kjhlkhklhkjhhkl |

**Note:** Non-Relatives will only display here if a Notification of Placement was sent to that non-relative. Any Relative Search records that were created when they were copied over from another child when the Notification of Placement was created, will need to have the relationship and placement consideration section completed before the plan can be approved.

10. In the Consideration of Siblings section, select the appropriate radio button.



**Consideration of Siblings**

No siblings documented.  Modify

| Names | DOB | Age | DOD | Gender | Relationship | OHC Placement Provider |
|---|---|---|---|---|---|---|

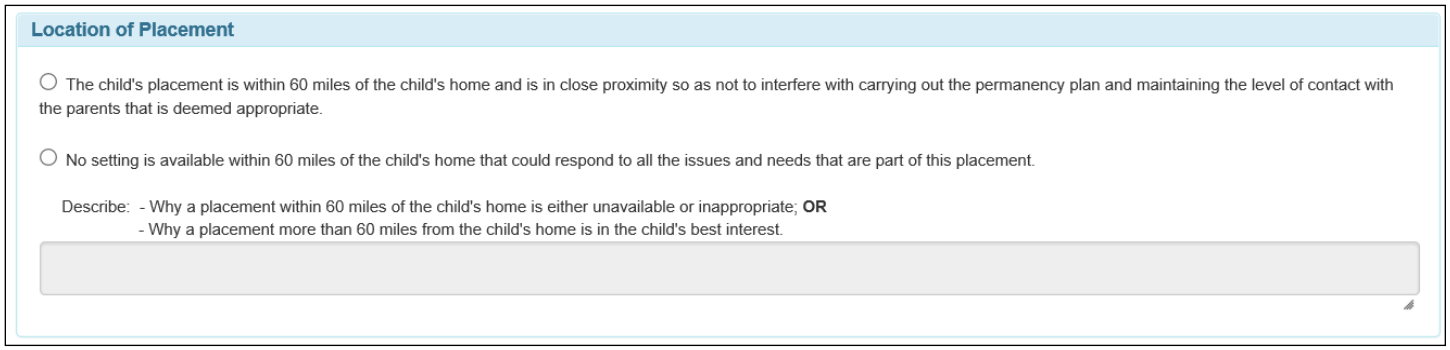
Are all siblings that are in OHC placed together?

○ Does not apply. Child has no siblings or other siblings are not in placement.

○ Yes

○ No, explain:

11. In the Location of Placement section, select the appropriate radio button. If the "No setting is available…" radio button is selected, enter narrative in the associated box.



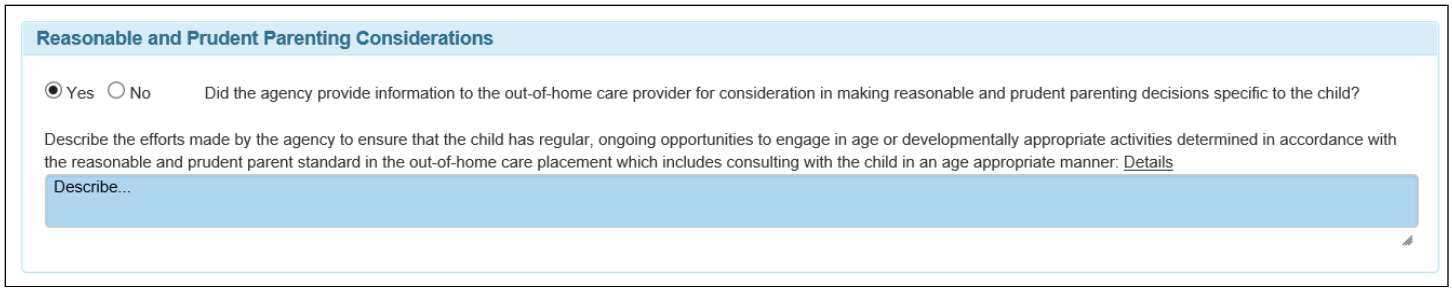
**Location of Placement**

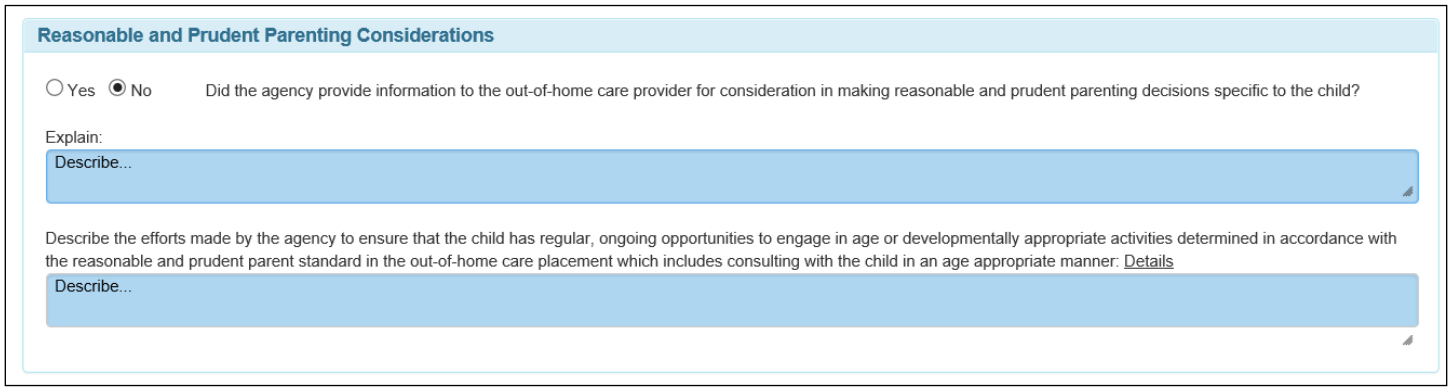
○ The child's placement is within 60 miles of the child's home and is in close proximity so as not to interfere with carrying out the permanency plan and maintaining the level of contact with the parents that is deemed appropriate.

○ No setting is available within 60 miles of the child's home that could respond to all the issues and needs that are part of this placement.

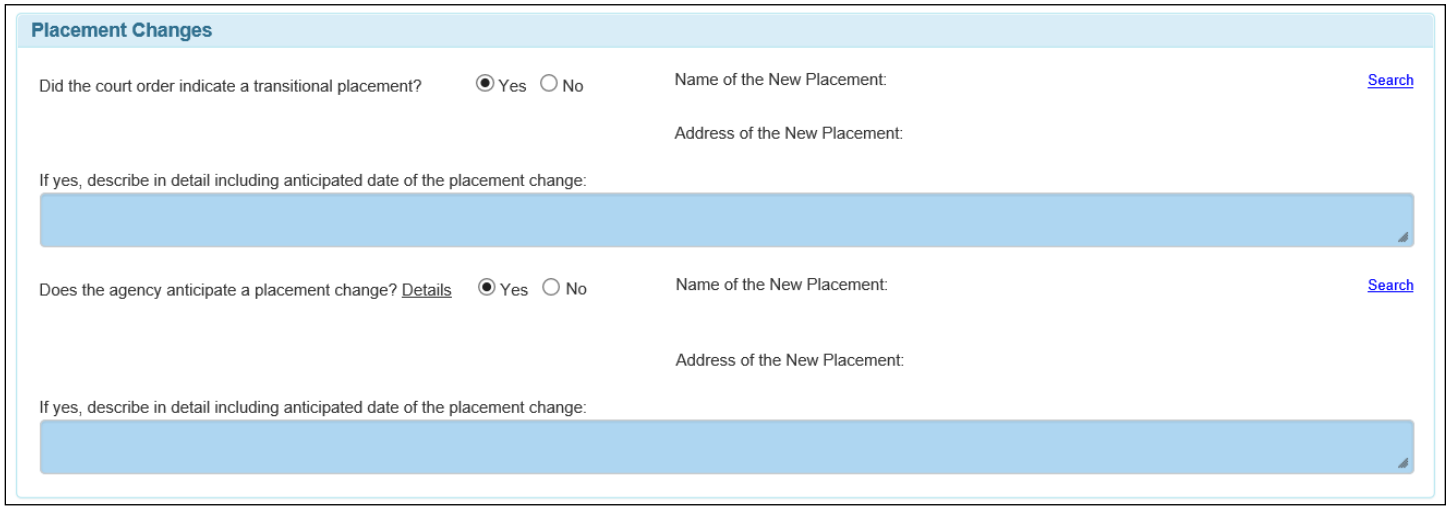
Describe: - Why a placement within 60 miles of the child's home is either unavailable or inappropriate; **OR**
- Why a placement more than 60 miles from the child's home is in the child's best interest.

12. In the Reasonable and Prudent Parenting Considerations section, select the appropriate radio button. If the "Yes" radio button is selected, enter narrative in the associated box. If the "No" radio button is selected, enter narrative in the associated boxes.

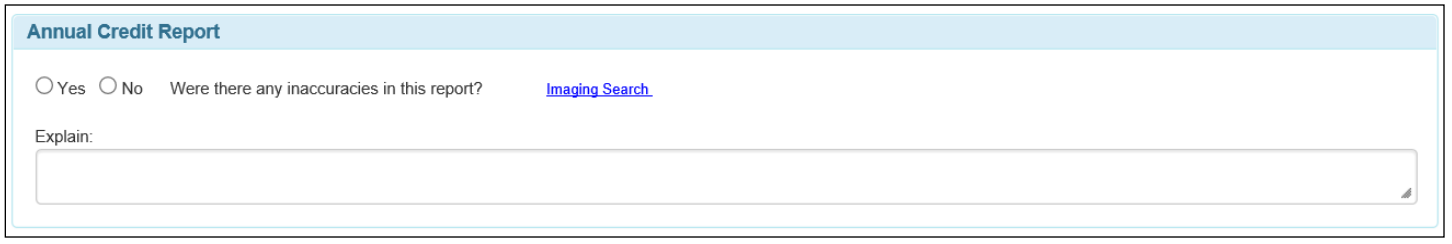



13. In the Placement Changes section, select the ”Yes” or “No” button for each of the questions. If the court ordered a transitional change or the agency anticipates a placement change, click on the Search hyperlink and search out the upcoming provider. The name and address of the new placement will prefill to the plan. Enter text in the associated narrative field.

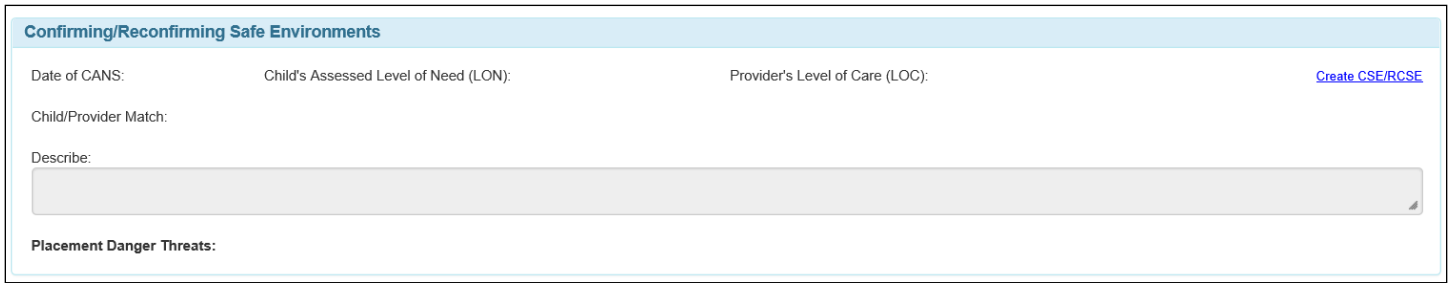



14. In the Annual Credit Report section, select the ”Yes” or “No” button for each of the questions. Click the Imaging Search hyperlink to attach an image. If the child is under 14 years of age, only the second question will be displayed. If the child is older than 14, both the questions below will be displayed. Additionally, there is an optional narrative box to enter comments, if any.

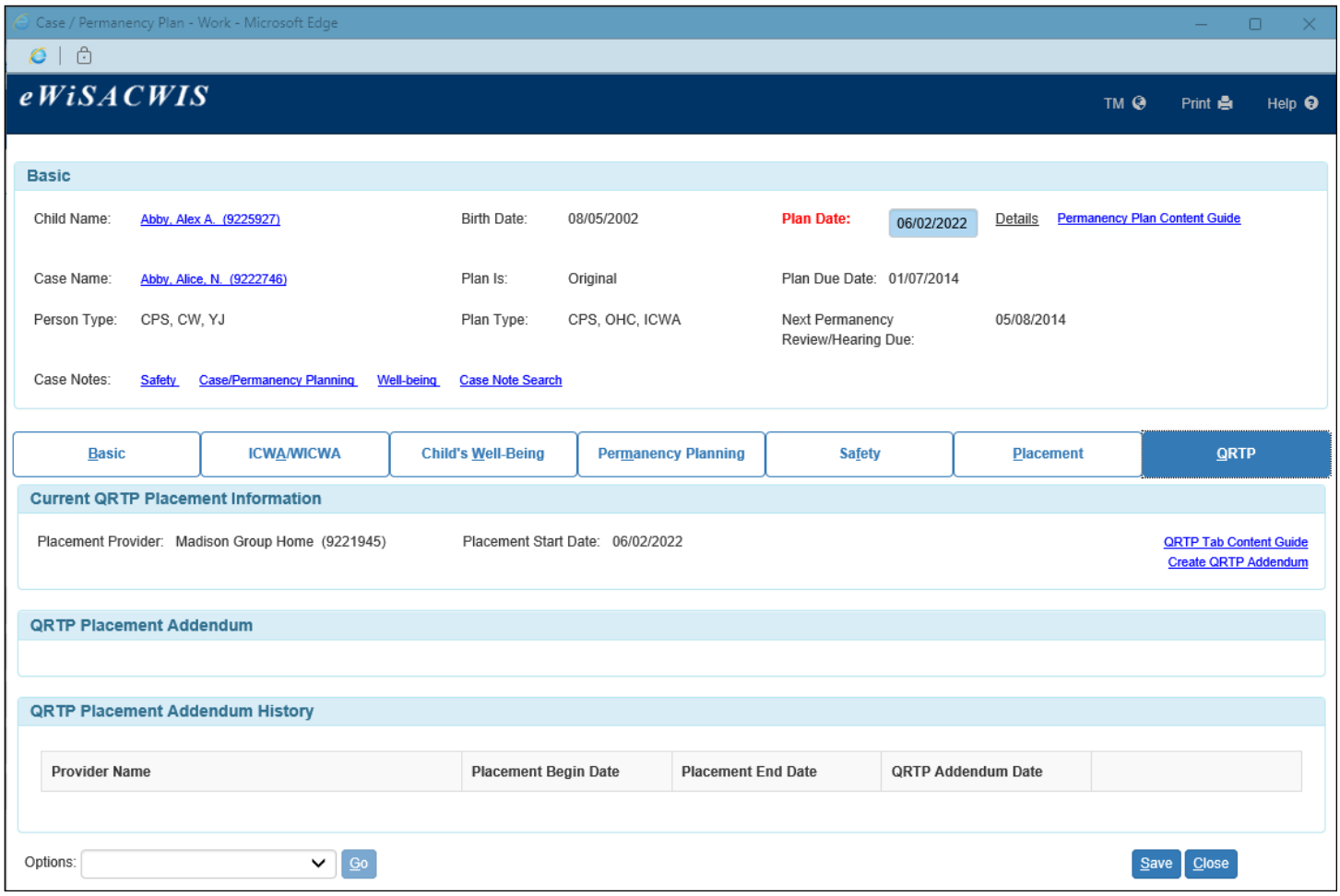


15. In the Confirming/Reconfirming Safe Environments section, information from the most recent Confirming/Reconfirming Safe Environments (CSE/RCSE) will prefill. If the CSE/RCSE does not exist, click on the Create CSE/RCSE hyperlink. See the associated Confirming Safe Environments or Reconfirming Safe Environments User Guides for additional information.

**Note:** If the CSE/RCSE is pending, the hyperlink will read "Modify CSE/RCSE." If the CSE/RCSE is approved, the hyperlink will read "View CSE/RCSE." There must be an associated approved CSE/RCSE within the past 6 months to approve the Permanency Plan.

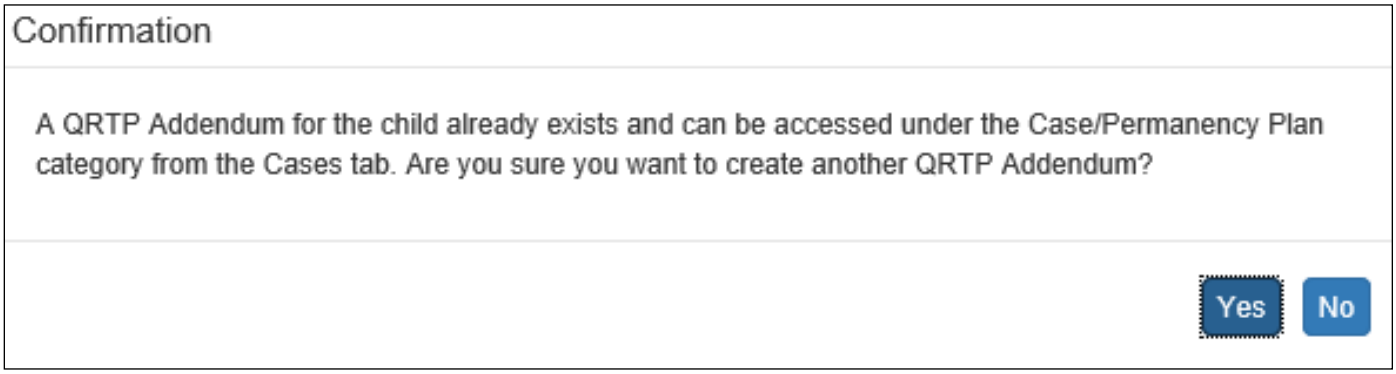


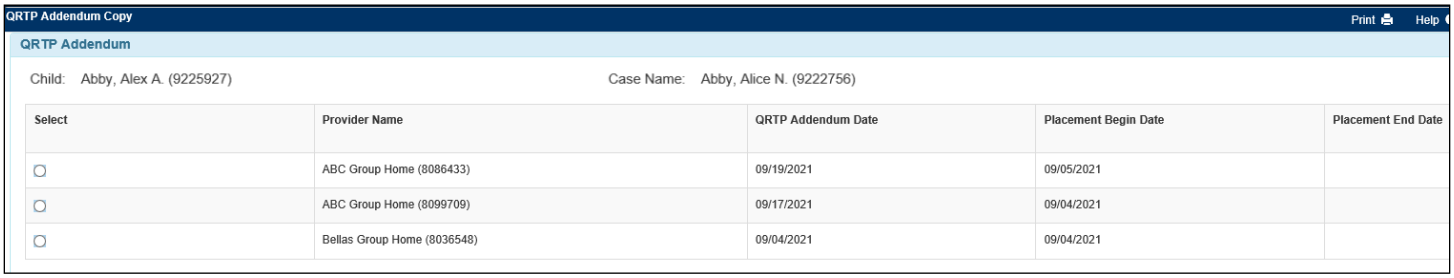

The QRTP tab will only display if a Placement is documented with a Residential Care Center or Group Home Provider that has an active Qualified Residential Treatment Provider (QRTP) Certification documented on the facility license.




16. A QRTP Addendum can be created from this tab and once approved the information will prefill to the tab. Click the Create QRTP Addendum hyperlink. If one already exists, a message will display. Clicking "Yes" will

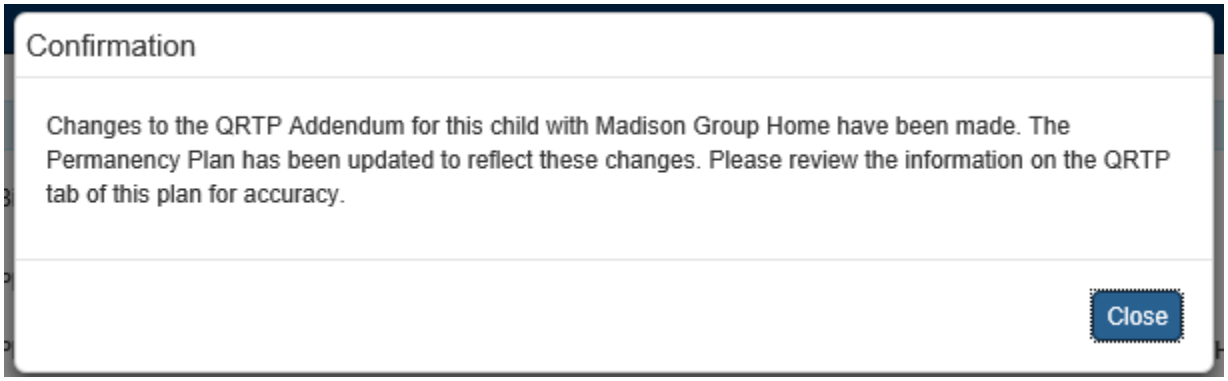
launch the QRTP Addendum Copy page. Clicking “No” will return to the previous page. Click the QRTP Tab Content Guide hyperlink to view more information in the Permanency Plan Writing Guide.

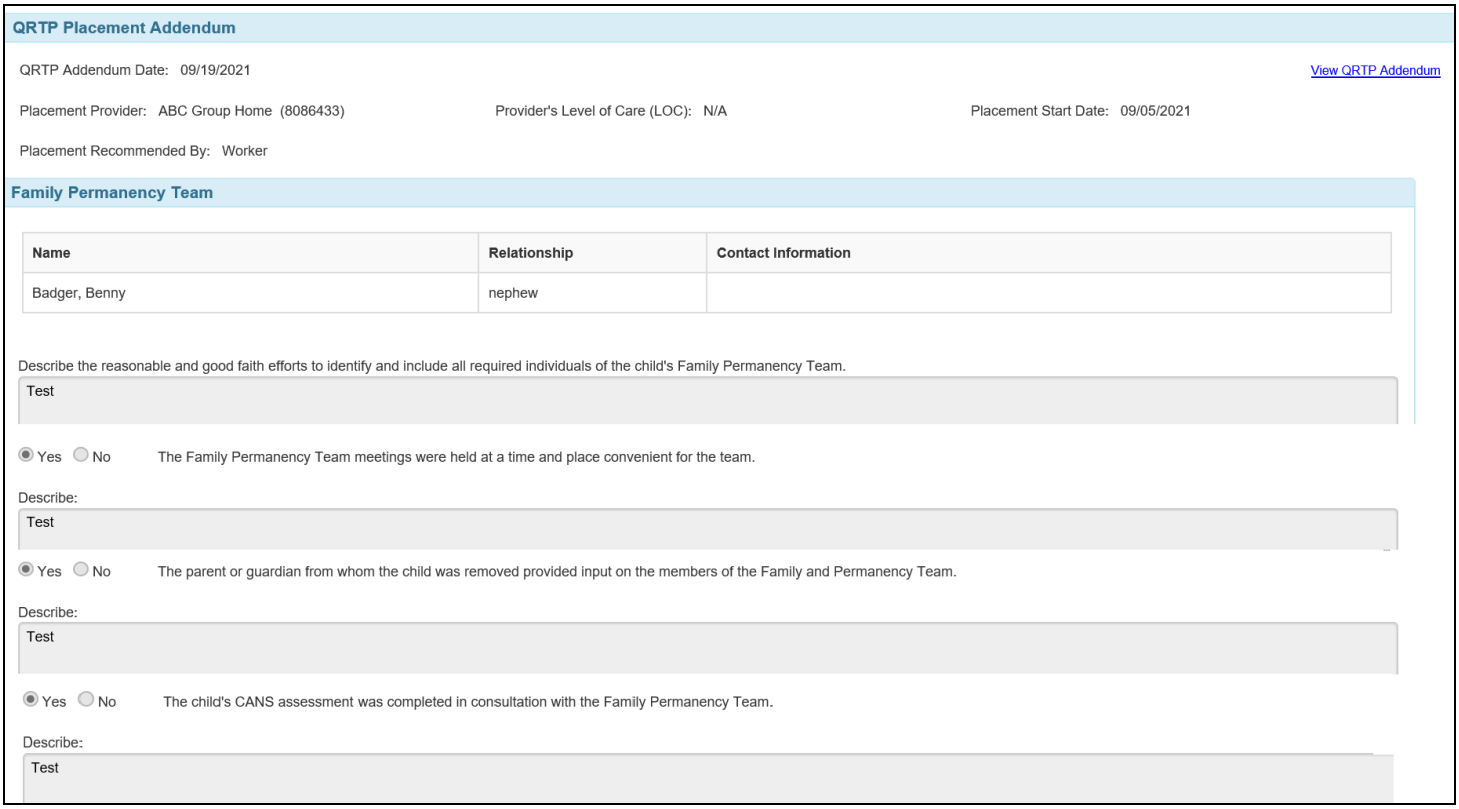



17. If an approved QRTP Addendum exists, the View QRTP Addendum hyperlink will display. A Pending QRTP Addendum hyperlink will display if not approved.

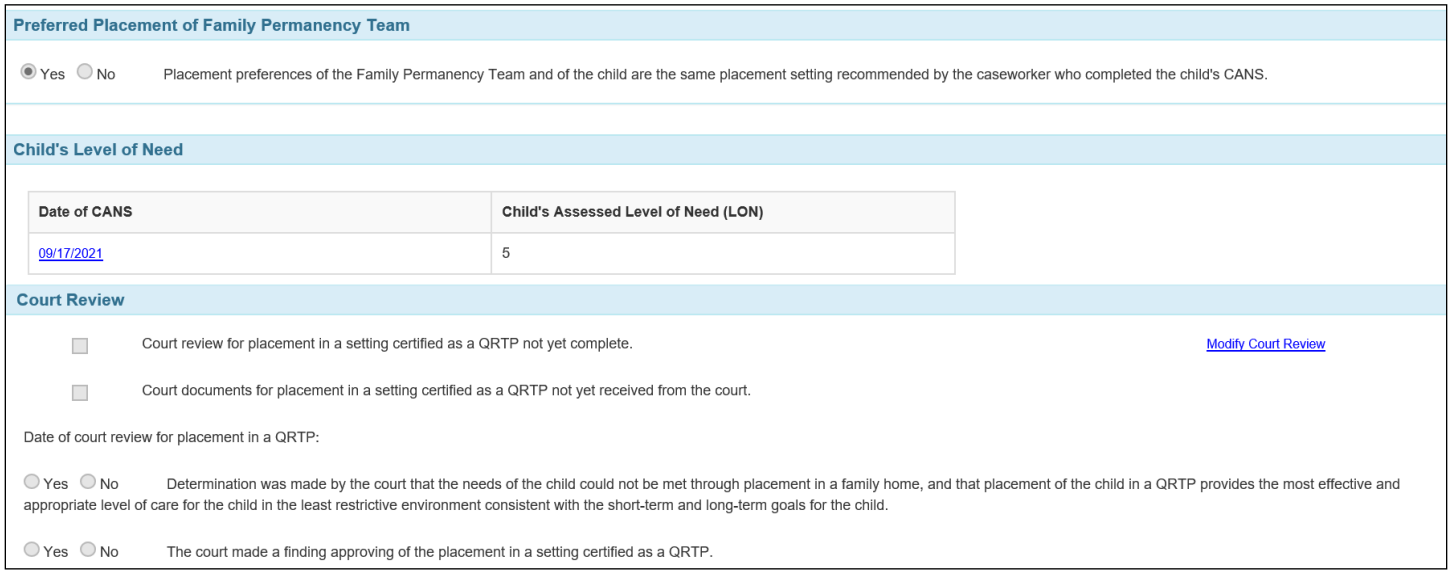
    a. Any updates to the Addendum will result in a message.
    b. Once approved the information from the Addendum will prefill to the tab.

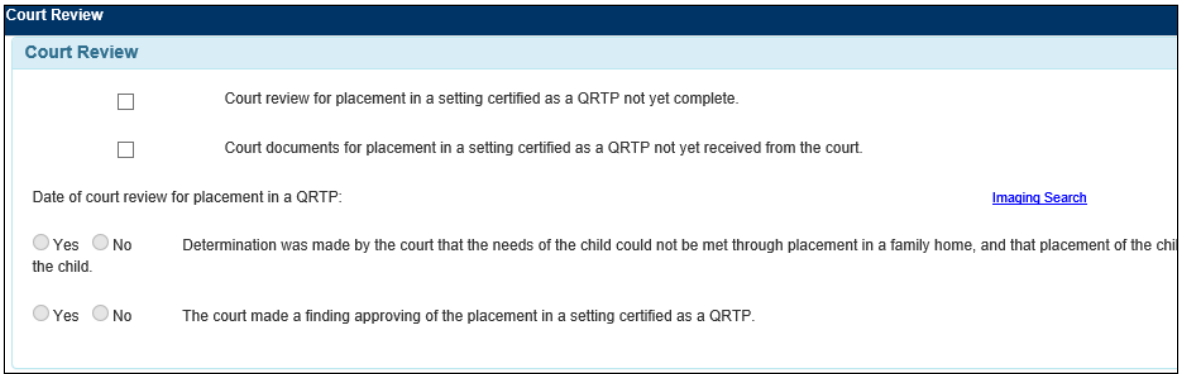




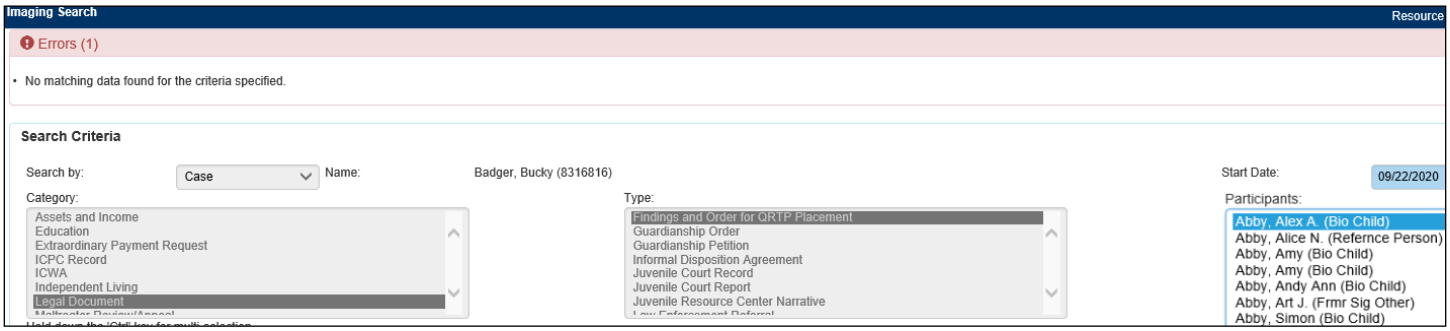

18. Family Permanency Team, Preferred Placement of Family Permanency Team, Child's Level of Need, Court Review, QRTP Out-of-Home Placement, QRTP Addendum History sections on the approved Addendum will prefill to the QRTP tab.
19. If there is an existing CANS a hyperlink to the approved CANS will display in the Date of CANS field. If one needs to be created, click the Create CANS hyperlink.

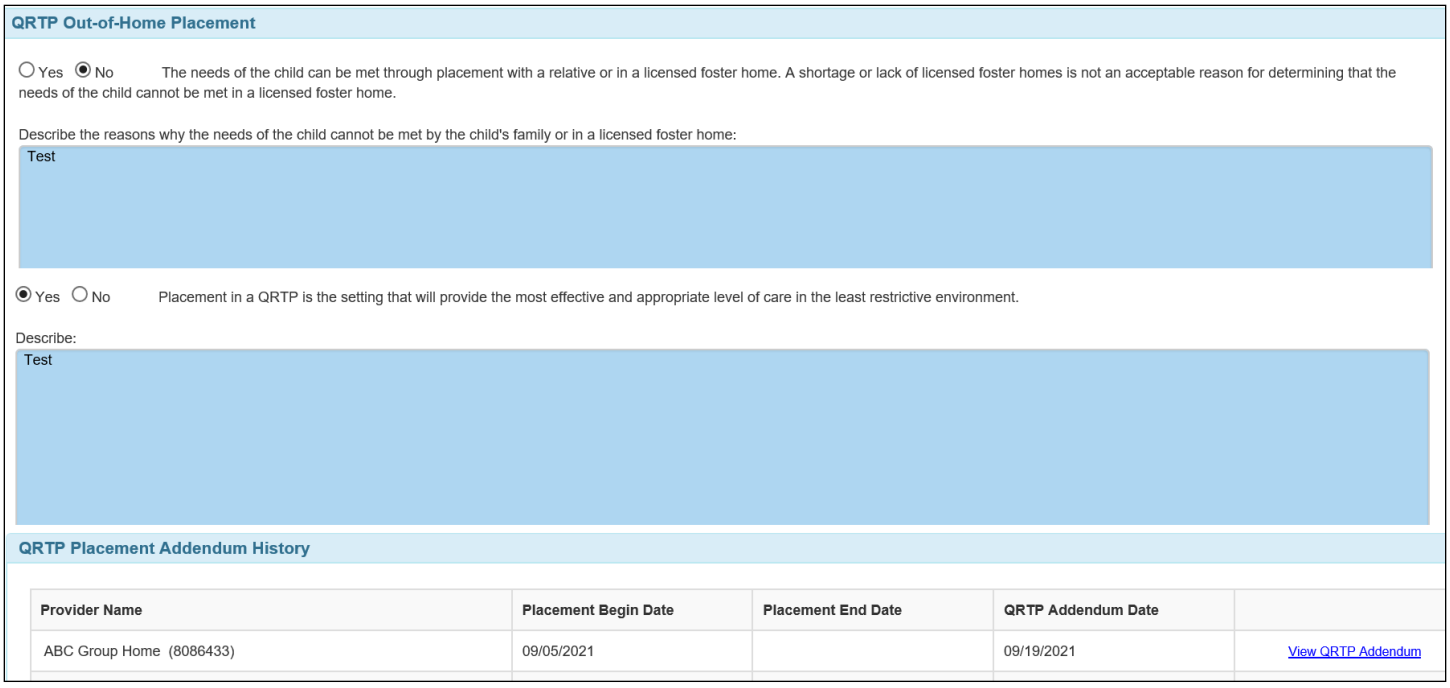
20. To modify the Court Review section, click the Modify Court Review hyperlink.

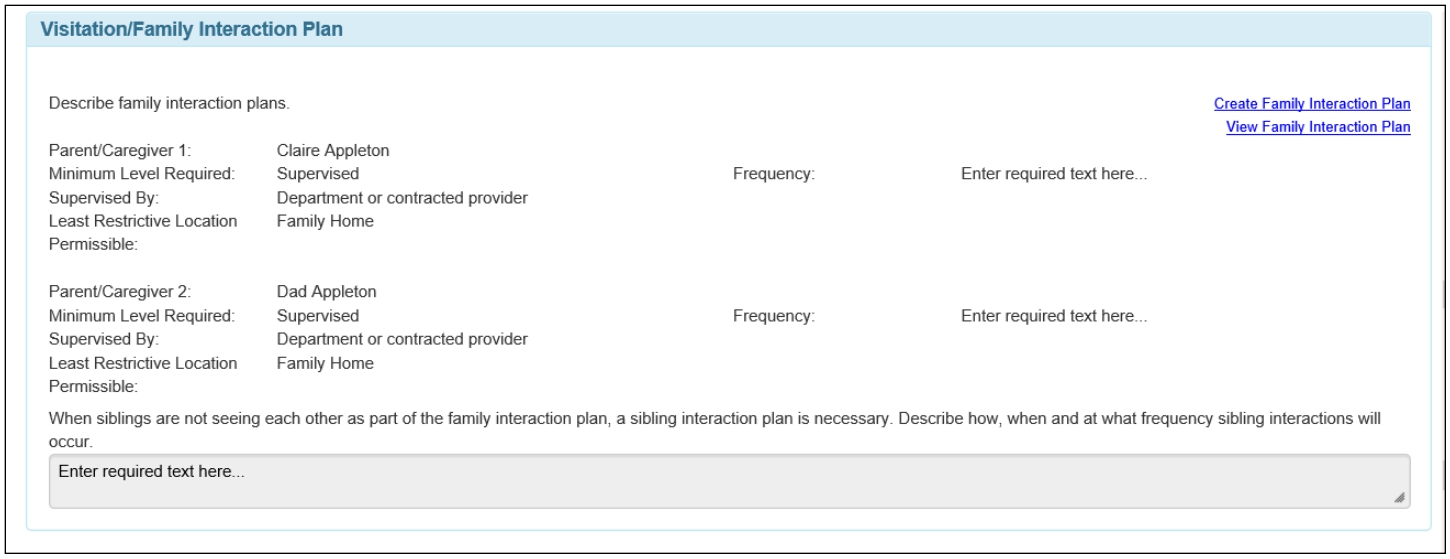





21. Imaging Search will search for existing documents with the Category and Type related to the Court Review. Click Create to add a document.

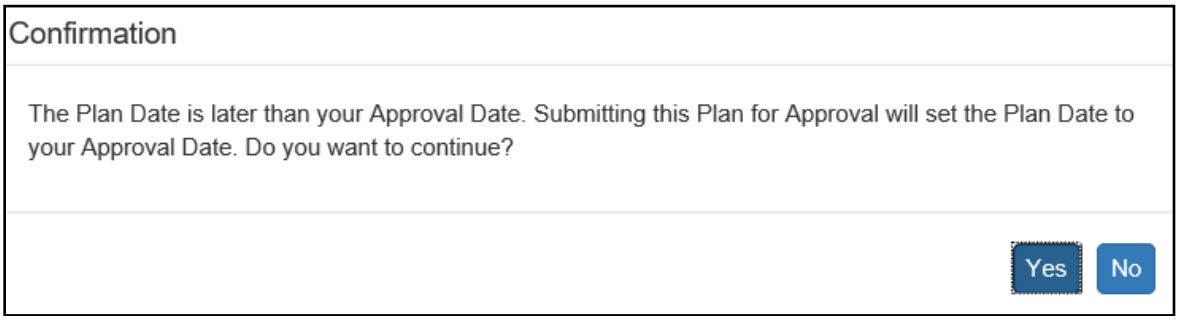




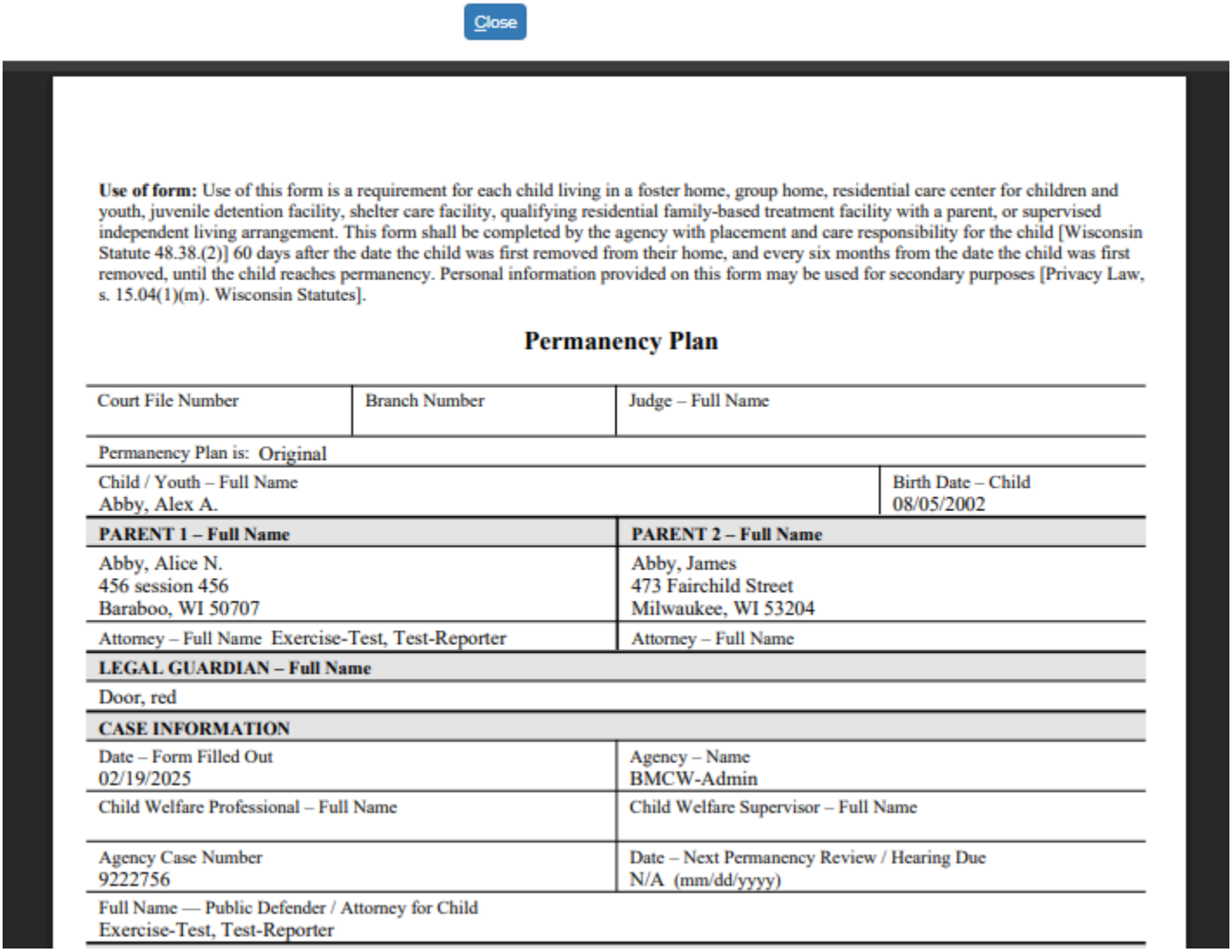

From the Options dropdown (on any of the tabs), you can approve the plan. Select Approval and click Go. On the Approval History page, select the Approve or Not Approve radio button and click Continue. On the Case/Permanency Plan page, click Save.

22. If a future Plan Date was documented, the Plan Date will update to today's date.

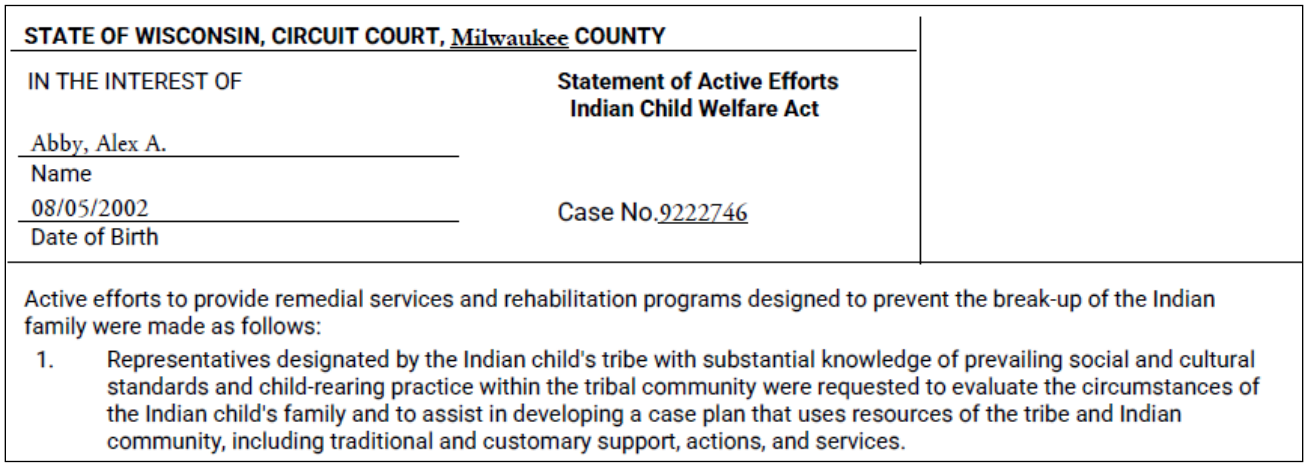



23. You can launch the Permanency Plan document from any tab of the plan. Select Permanency Plan and click Go.

**Note:** The worker and Supervisor names will not prefill to the document until after approval of the Plan. The document should be printed after approval.




24. If the the ICWA/WICWA tab is displayed on the plan, the State of Active Efforts ICWA document will also launch with the Permanency Plan.

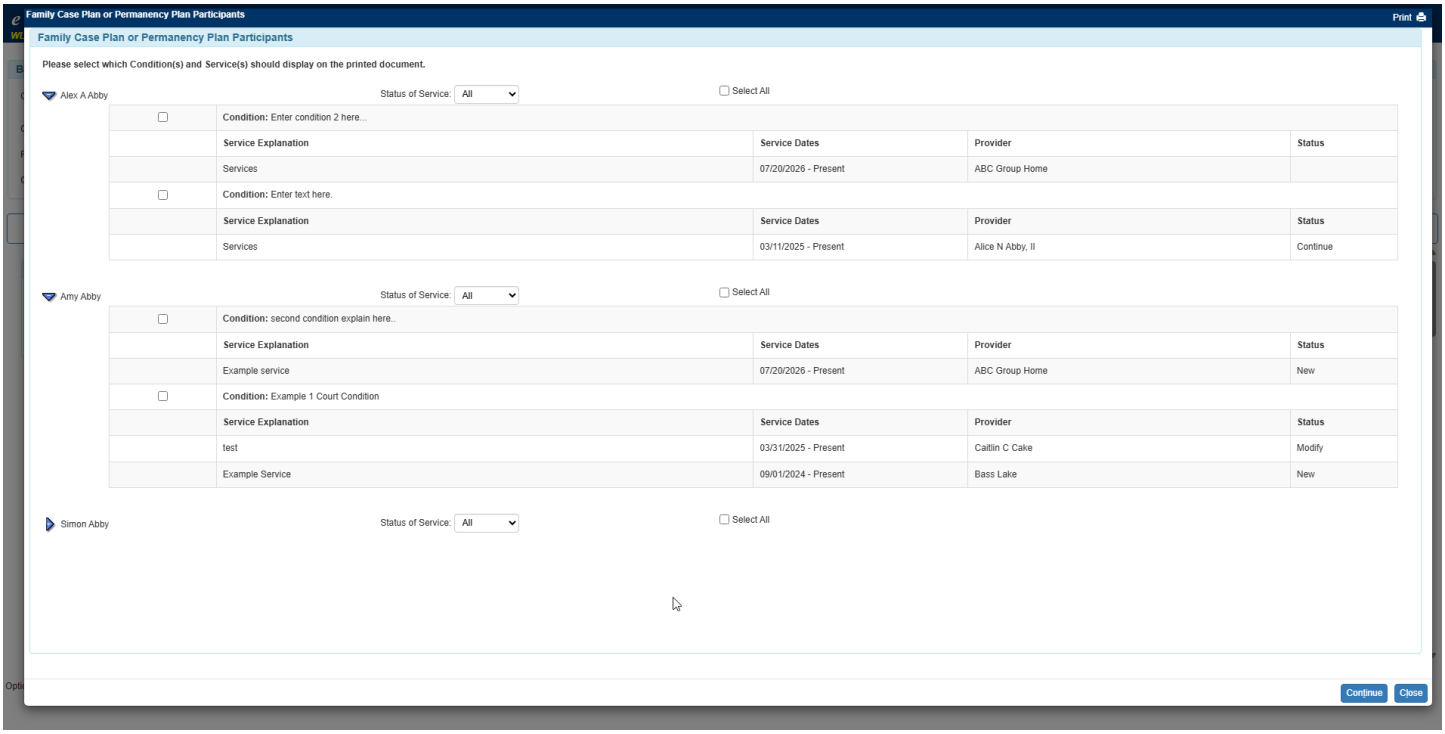


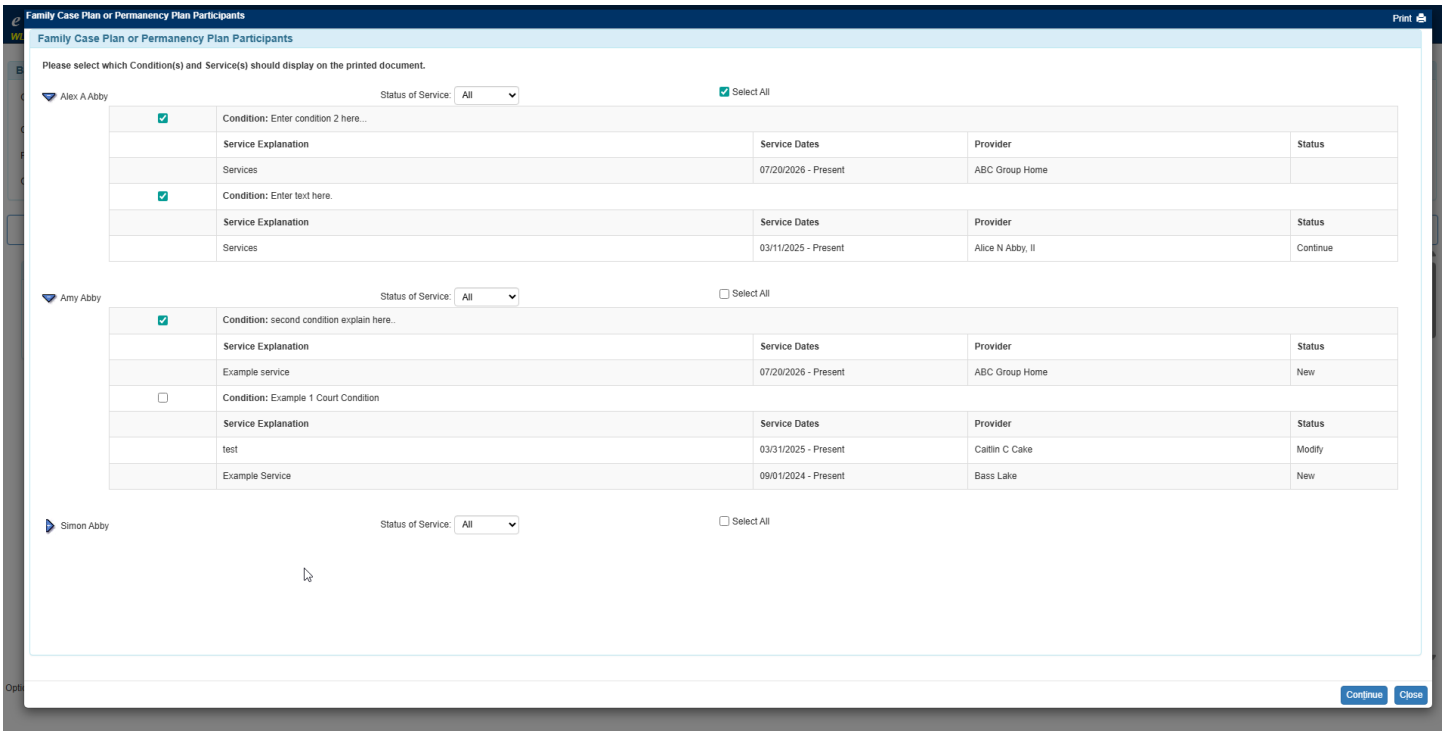

25. Launch the History of Planning and Services document from any tab of the plan. This document contains the full history of Conditions & Services that have been documented for the child(ren) on this plan (it does not print the selected period if the Display History checkbox is selected).

a. Select History of Planning and Services and click Go.

26. 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.



# History of Planning and Services

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

| Full Name: | Birthdate |
|---|---|
| Abby, Alex A. | 08/05/2010 (mm / dd / yyyy) |

| Full Name - Parent 1 | Full Name - Parent 2 |
|---|---|
| Abby, Alice N., II | Abby, James |

Full Name - Legal Guardian

Door, red

## CURRENT PLANNING AND SERVICES

### Conditions and Services

Full Name - Child / Youth: Abby, Alex A.

Condition: Enter condition 2 here...

Service Category: Family Therapy

Specifically Explain Service and Describe Progress: Services

Applies to: Abby, Alex A.

Name - Responsible Person / Provider: ABC Group Home

Frequency / Duration: 2 Days per Week

Begin Date: 07/20/2026 (mm / dd / yyyy) Target End Date: (mm / dd / yyyy)

Status of Service:

☐ Yes ☐ No Service or Treatment Needs Met by Placement in Setting Certified as a QRTP

Condition: Enter text here.

Service Category: Parenting Services

Specifically Explain Service and Describe Progress: Services

Applies to: Abby, Alex A.

Name - Responsible Person / Provider: Alice N Abby, II

Frequency / Duration: 1 Hours per Day

Begin Date: 03/11/2025 (mm / dd / yyyy) Target End Date: (mm / dd / yyyy)

Status of Service: Continue: Services were provided in the last six months and will continue in the next six months.

☐ Yes ☒ No Service or Treatment Needs Met by Placement in Setting Certified as a QRTP

Full Name - Parent / Caregiver: Abby, Amy

Condition: second condition explain here..

Service Category: Independent Living

Specifically Explain Service and Describe Progress: Example service

Applies to: Abby, Amy

Name - Responsible Person / Provider: ABC Group Home

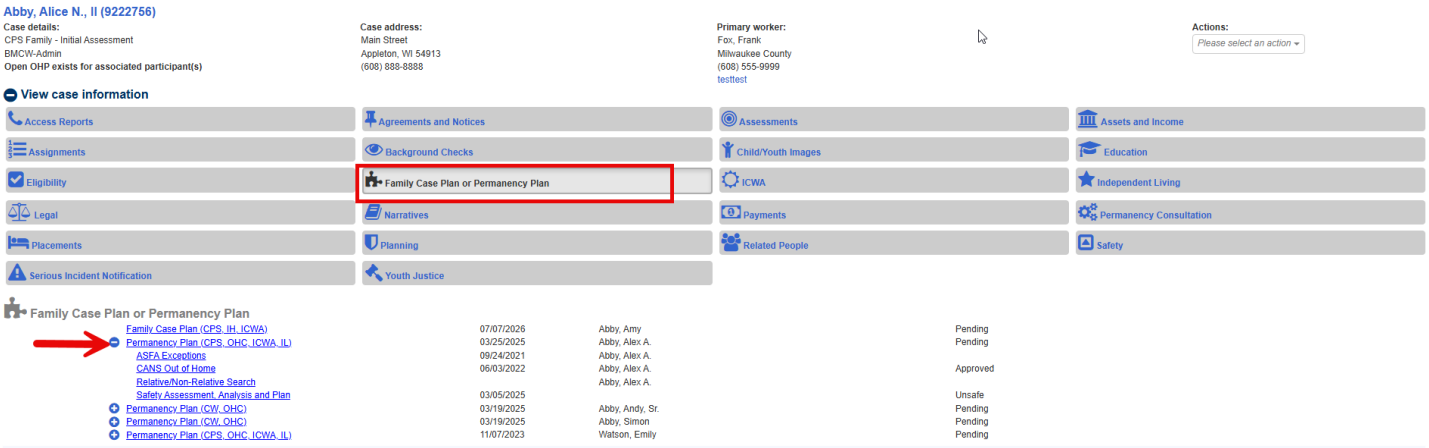
Frequency / Duration: 1 Hours per Week

Begin Date: 07/20/2026 (mm / dd / yyyy) Target End Date: (mm / dd / yyyy)

Status of Service: New: New service will begin in the next six months:

## HISTORICAL PLANNING AND SERVICES

The Permanency Plan hyperlink will appear on the desktop under the Case/Permanency Plan icon. Click the expanding Permanency Plan icon to see all related work associated to that Permanency Plan (a hyperlink to the associated Review or Hearing displays to the right if they exist).




An option to revise a Perm Plan is available in the Options dropdown if revisions were ordered at the Hearing/Review. The revise option will only be available if the review is a judicial review or a panel review with one of the recommendations selected as "Yes" and the review must be within 30 days of the plan date.

**Note:** Users can "Revise" certain areas of their Permanency Plan for up to 30 days after going through a Permanency Hearing/Review.
The Revise option is available when either of the following circumstances exist:

- The "Date of Hearing/Review" date on an approved Permanency (Panel) Review, where at least one of the three questions under the "Recommendations" expando on the Panel Determinations and Recommendations tab is 'Yes,' within 30 days of the Plan Date on the approved Permanency Plan. Note: this is when setting the Method to Agency Panel or Independent Agency Panel. If the Method is Judicial then disable the Panel Determinations tab.
- The "Date of Hearing/Review" date on an approved Permanency Hearing is within 30 days of the Plan Date on the approved Permanency Plan.

On a revised plan the Permanence Goal and the Conditions and Services on the on the Permanency Planning tab can be edited along with the Conditions and Services on the Child's Well-Being tab. Everything else copies over exactly from the plan that the revise option was launched from. To revise a plan, select 'Revise' from the options dropdown on the plan to be revised.