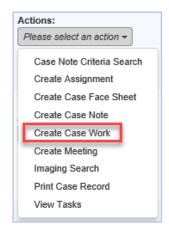
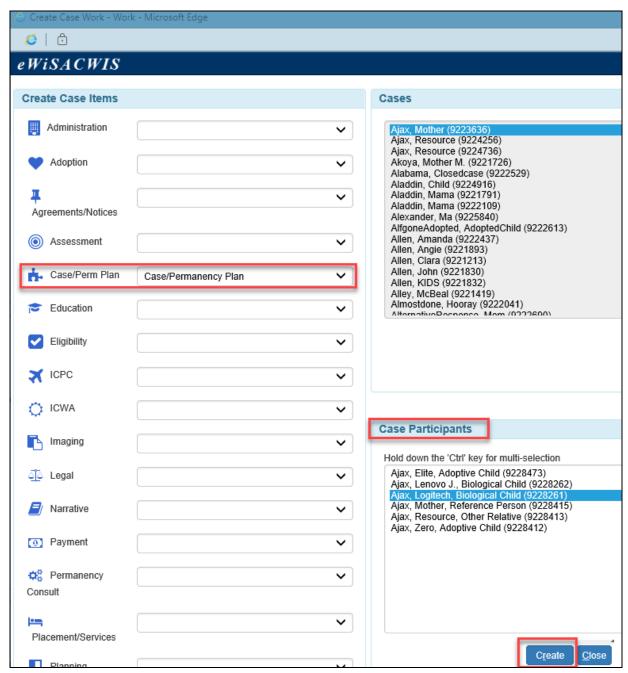
Case Plan

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

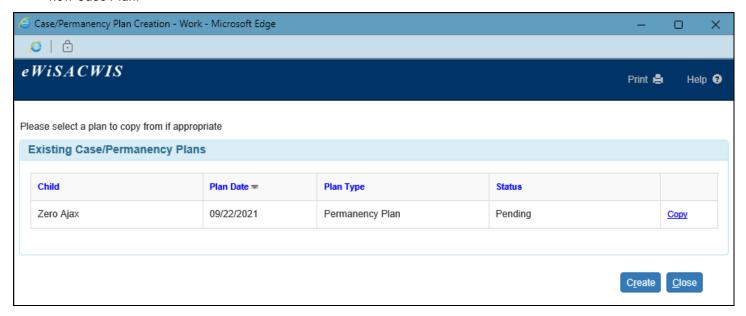
- From the desktop, go to the Cases tab and click the Create Case Work hyperlink
 Create case work or select Create Case Work from the Actions drop-down next to the specific case to open the Create Case Work page.
- 2. On the Create Case Work page, select Case/Permanency Plan from the Case/Perm Plan 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 multiselection on the Create Case Work page. Alternatively, additional children can be added to the Case Plan on the Case/Permanency Plan page.

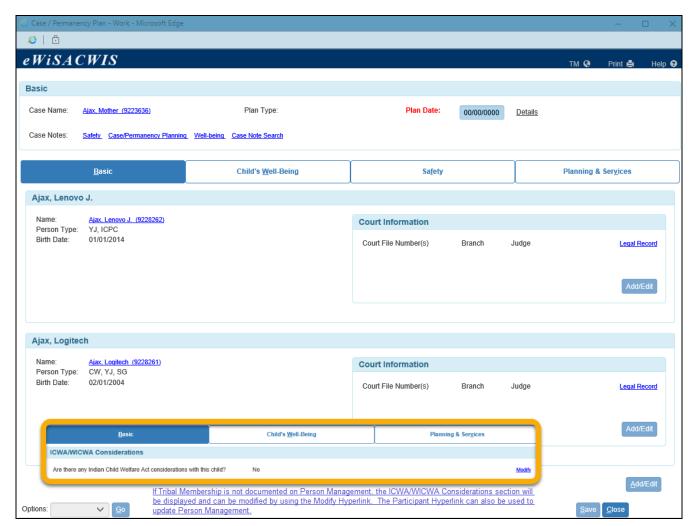




Note: A Person Type must be documented on Person Management to create a Case Plan. See the Person Management User Guide for more information. If a Case Plan or Permanency Plan exists, the Case/Permanency Plan Creation page will appear. Click the Copy hyperlink to copy an associated Plan. Otherwise, click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



3. On the 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(ren)'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. To approve the plan, a future Plan Date is not allowed but upon approval, the Plan Date can be updated to the approval date.

- 4. The first tab is the Basic tab. The Basic tab displays the name of the child as a section with the name displayed as a hyperlink. Selecting this hyperlink will open the Person Management page to edit the child's information.
- 5. To add additional children 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 on the plan. Click Continue to return to the Case/Permanency Plan page. Any child 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

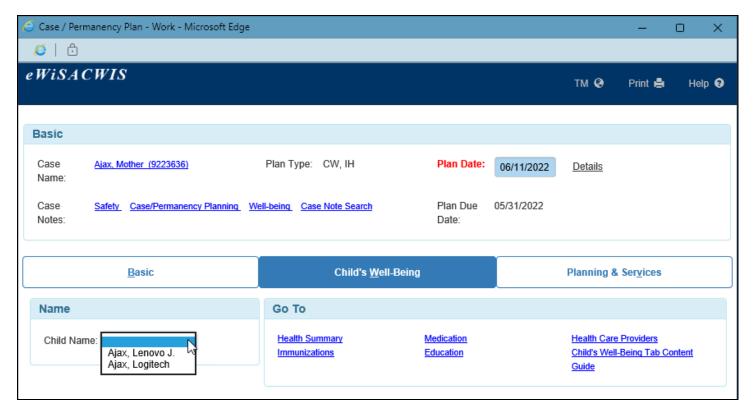


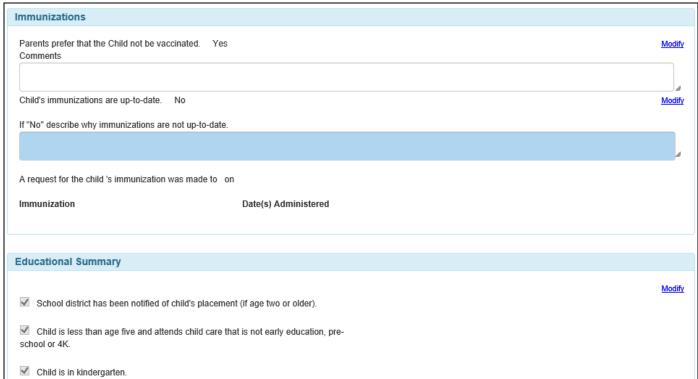
7. In the Court Information section, click the Add/Edit button in the Court Information section to add the court information. On the Court Information Selection page, select all applicable court numbers for the child. If the appropriate court number is not displayed, click the Legal Record hyperlink to add the court information to the Legal Record. Once all court numbers have been selected, click the Continue button to return to the Case/Permanency Plan page.



8. The next tab is the Child's Well-Being tab. If there are multiple children on the plan, select the child's name from the drop-down (select Yes to the pop-up to save the page) and the page displays with the Child'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.

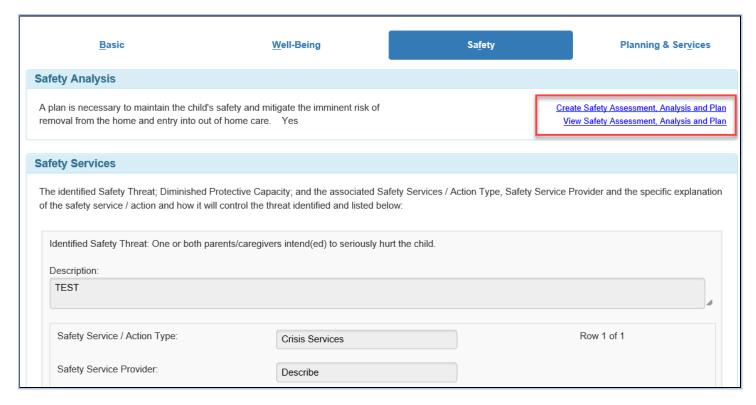
Note: Use the links in the 'Go To' section to jump to that specific section of the Child's Well-Being tab.



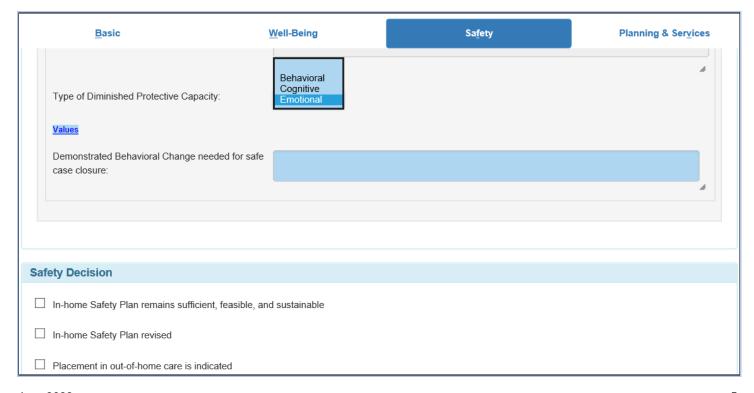


9. The Safety tab appears if there are safety concerns on the Safety Assessment, Analysis and Plan. From this tab, select the <u>Create Safety Assessment</u>, <u>Analysis and Plan</u> hyperlink to create a Safety Assessment, Analysis Plan.

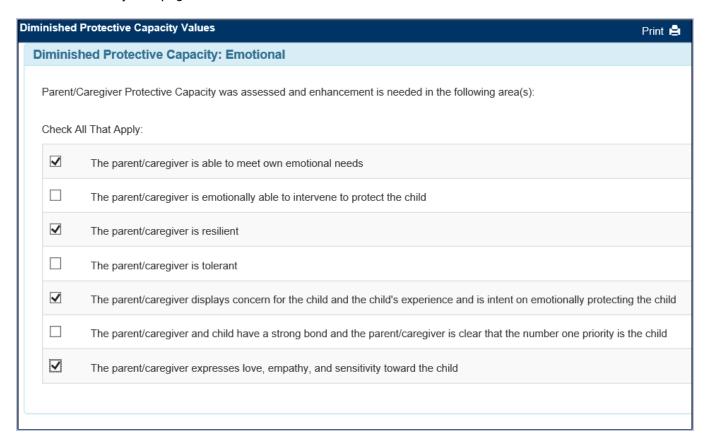
Note: When the Person Type is CPS, there must be an associated Safety Assessment, Analysis Plan in order to approve the Case Plan.



10. If Safety Services exist, select the Type of Diminished Protective Capacity, this will automatically launch the Diminished Protective Capacity Values page. The <u>Values</u> hyperlink can be used to return to the Diminished Protective Capacity Values page.



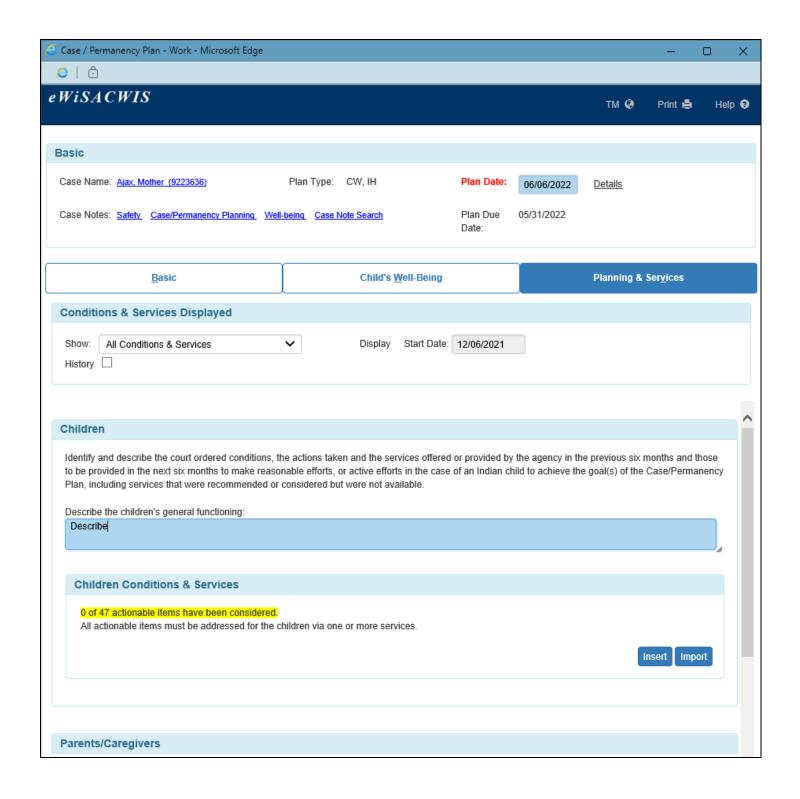
11. On the Diminished Protective Capacity Values page, select all applicable values. Click Continue to return to the Case/Permanency Plan page.



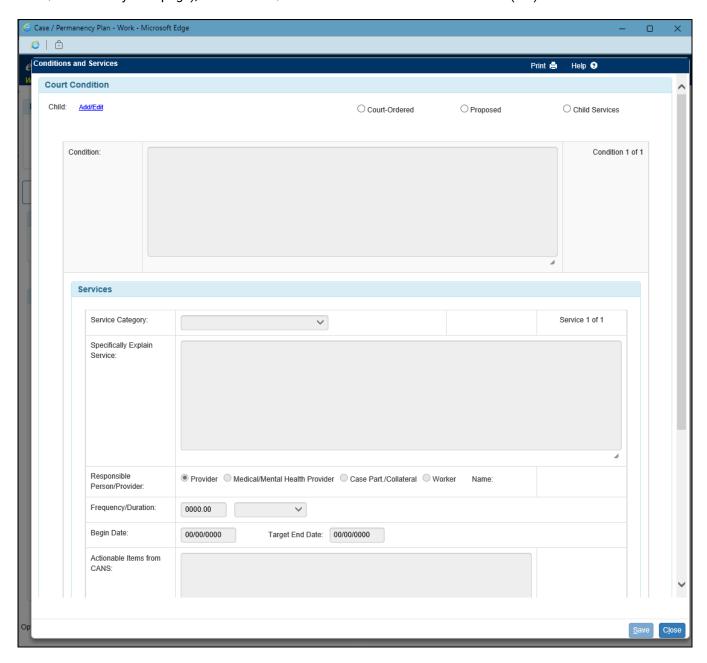
- 12. Document the Demonstrated Behavioral Change needed for safe case closure.
- 13. The last tab is the Planning & Services tab. This tab displays Conditions and Services which were provided in the last 6 months or will be provided in the next 6 months. The 'Show' drop-down in the Conditions & Services 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.

The Child(ren) section will pre-fill information from the most recent pending or approved Assessment, if applicable. Enter the child's general functioning information. Click Insert in the Child Conditions & Services section to add child Conditions and Services. This will open the Conditions and Services page. Click Import to copy goals and/or services from another plan on the case. This will open the Conditions and Services Summary page. See step 25 on page 14 for the import feature.

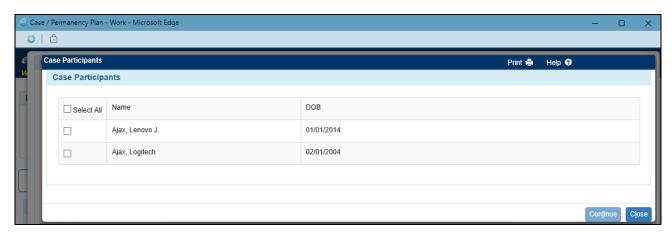
Note: The text highlighted in yellow displays the number of actionable items from CANS that need to be addressed.



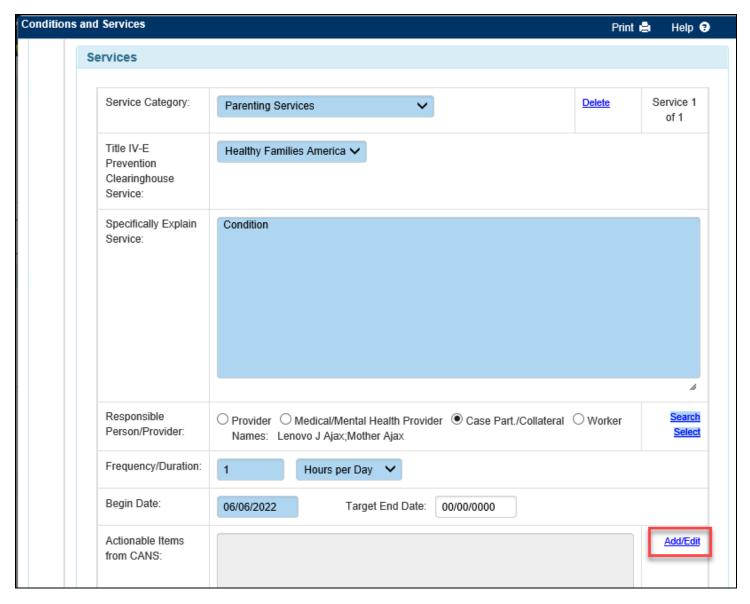
14. On the Conditions and Services page (accessed via the Insert button on the Planning & Services tab of the Case/Permanency Plan page), click the Add/Edit button to add the associated child(ren).



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

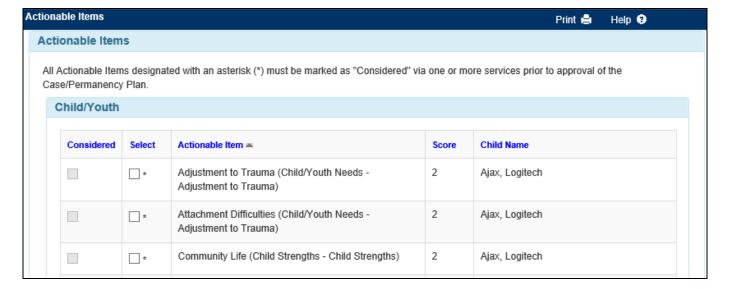


- 16. <u>Select the radio button that is appropriate for the Condition being entered.</u> <u>Court-Ordered, Proposed, or Child Services.</u> Once one of these are selected the remainder of the page can be entered.
- 17. Back on the Conditions and Services page, enter the Condition. In the Services section, 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 status. 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 Case/Permanency Plan page. If Applicable, click on the Add/Edit hyperlink next to the Actionable Items from CANS. This will open the Actionable Items page.

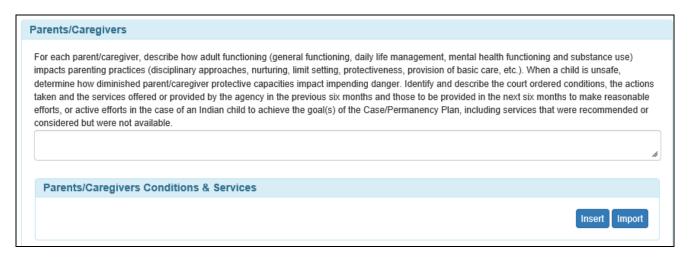


18. On the Actionable Items page, select all applicable actionable items that relate to the service. Then click Continue to return to the Case/Permanency Plan page.

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 in order to approve the Case Plan.



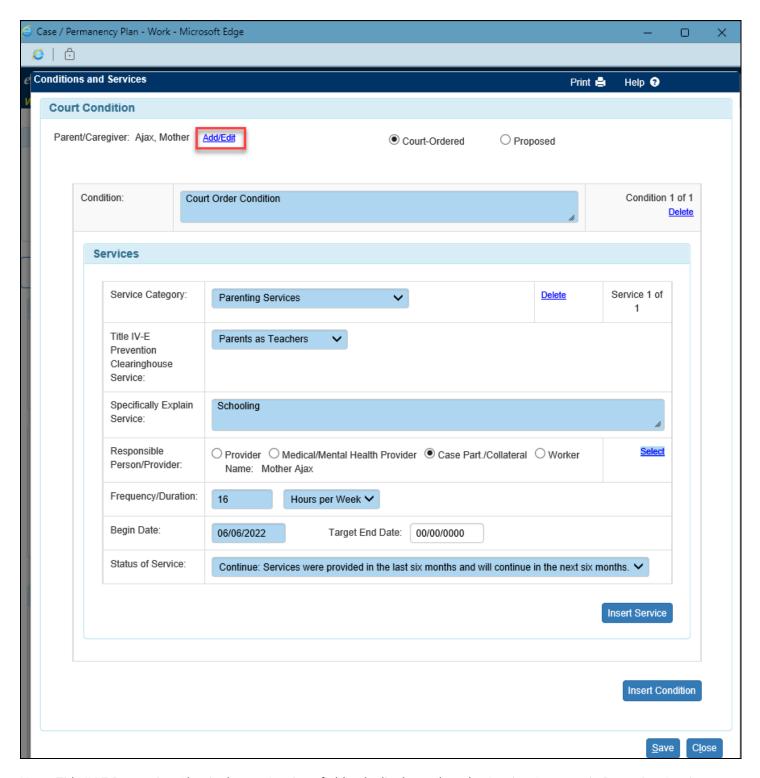
19. The Parents/Caregivers section will pre-fill information from the most recent pending or approved Assessment. This narrative box is enabled to enter additional information.



- 20. 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.
- 21. On the Conditions and Services page, click the Add/Edit hyperlink to add the parents/caregivers these Conditions and Services are associated to.
- 22. On the Case Participants page, select the applicable parents/caregivers. Click Continue to return to the Conditions and Services page.



23. 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 status. 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 Case/Permanency Plan page.



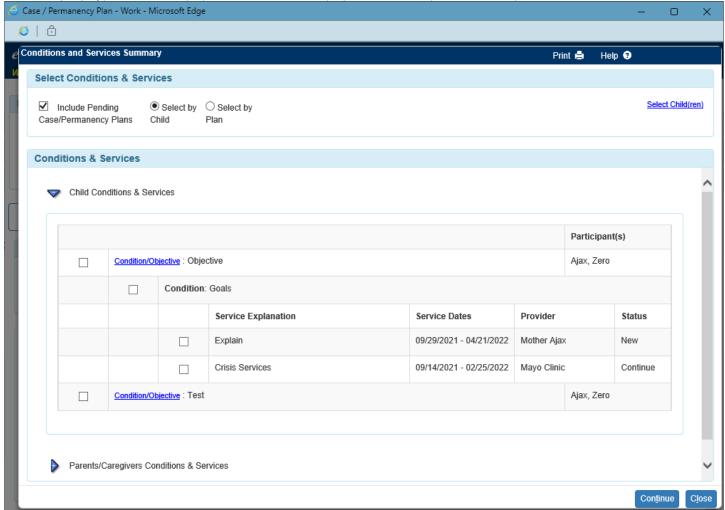
Note: Title IV-E Prevention Clearinghouse Services field only displays when the Service Category is Parenting Services.

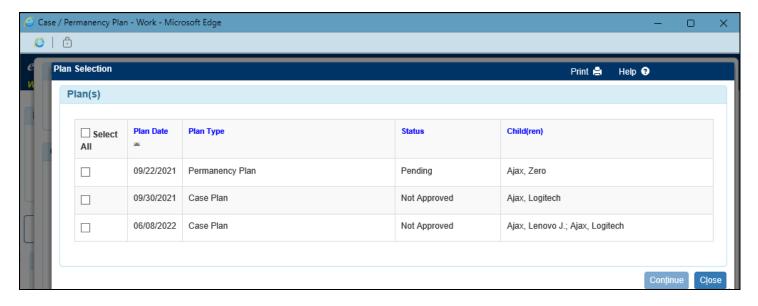
The Title IV-E Clearinghouse Service drop-down will have multiple options. Select one of the approved Title IV-E

Clearinghouse Services or select N/A if the family is receiving a different service not listed. Currently, a very small number of CPS families receive a Title IV-E Clearinghouse service. For most case situations you would select N/A.

- 24. As noted above, clicking the Import button under the Child(ren) Conditions & Services or Parents/Caregiver Conditions & Services brings up the Conditions and Services Summary page. This page is used to copy goals from other 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.
- 25. The Select Conditions & Services section is used to filter which plans the Conditions and Services on this page will come from. Unchecking Include Pending Case/Permanency Plans will hide any plan in a pending status.

26. 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.





- 27. Select the Select by Plan radio button to bring up the Plan Selection pop-up to select a specific plan.
- 28. 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 Case/Permanency Plan page, the selected Conditions/Objectives, Conditions and Services will appear under the corresponding Conditions & Services Section.

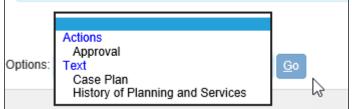
Note: Checking the box for a Service will automatically check the box for the associated Condition/Objective.

29. 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

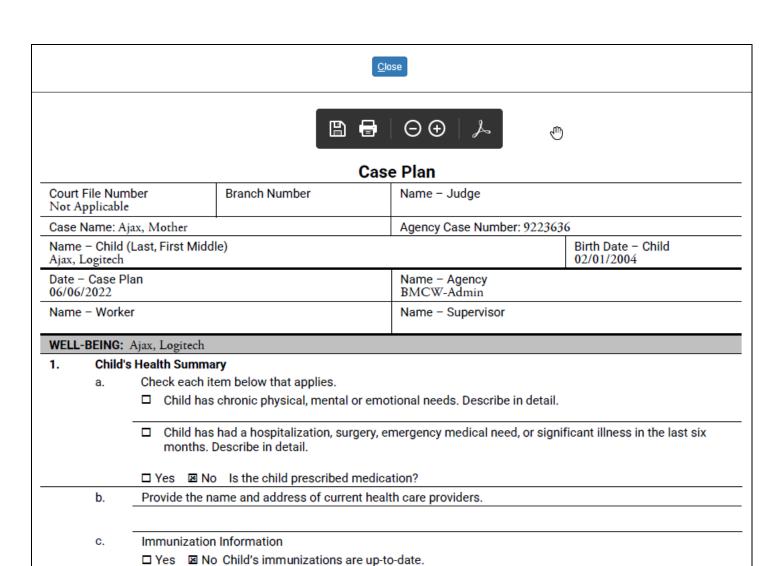
Case/Permanency Plan page, click Save. If a future Plan Date was documented, the Plan Date can be updated to today's date.

updated to today's date.

30. The Case Plan template can be launched from any tab of the plan. Select Case Plan and click Go.



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



If "No," describe why immunizations are not up-to-date and how and when this will be rectified.

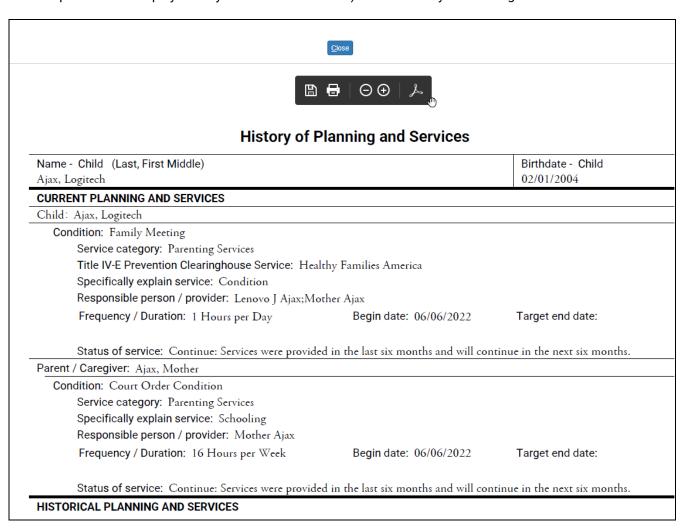
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☐ Yes ☑ No Parent(s) prefer that the Child not be vaccinated.

d.

Immunization Record

31. 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) 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.



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

