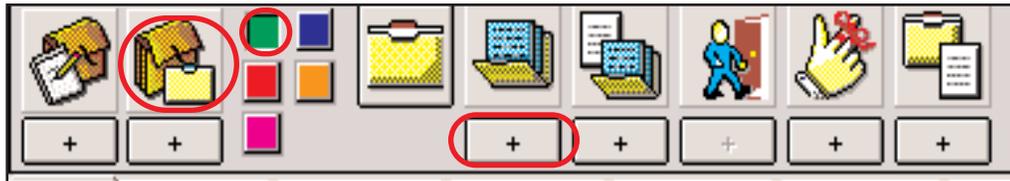
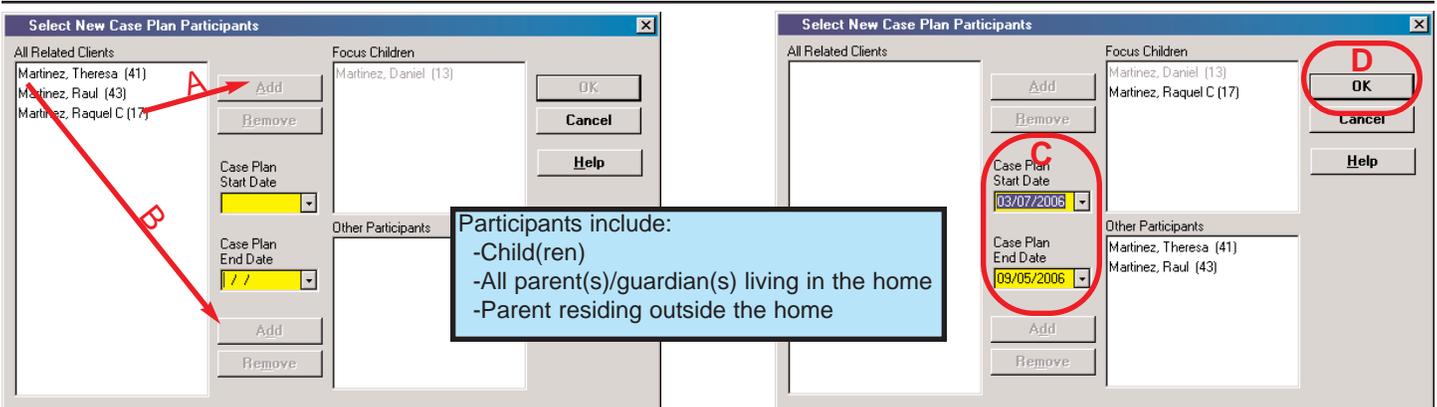


# Creating an Initial Case Plan

**Before you begin a case plan, always remember to complete case clean-up procedures to ensure that the correct information populates from data fields to documents. In addition to case clean-up, complete the Structured Decision Making Assessment Tools.**



**STEP 1.** Click on **Open Existing Case**. Retrieve the case(s) for the case plan focus child(ren). In the green section, **click** on the “+” button to **Create New Case Plan**.



**STEP 2.** In the Select New Case Plan Participants dialogue box:

(A) **Select** children to be the case plan focus children, then **click** the top “Add” button.

(B) **Select** other participants and **click** the bottom “Add” button. "

(C) **Enter** the start date for the case plan. NOTE: The end date will automatically default to 6 months from the start date. Edit if needed.

(D) **Click** the OK button.

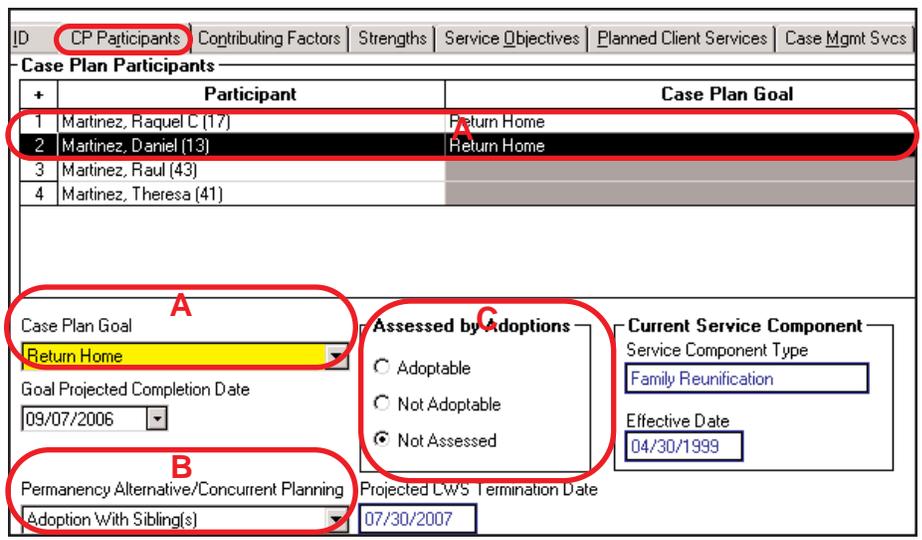
**STEP 3.** On the **CP (Case Plan) Participants Page**:

(A) **Select** child’s row and then enter the Case Plan Goal

(B) **Select** the Permanency Alternate/Concurrent Planning goal, if appropriate.

(C) **Select** the option button that identifies the child’s assessment by Adoptions.

NOTE: Repeat steps A-C for each case plan focus child. Remember only the case plan focus child(ren) receive a case plan goal.



Contributing Factors	Strengths	Service Objectives	Planned Client Services	Case Mgmt Svcs
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Assessment Needs

Assessment Strengths

Identify each participant's Service Objectives. A determination of their progress will be entered in the Case Plan Update.

What it takes to get participants to their Service Objectives by the next Case Plan Update.

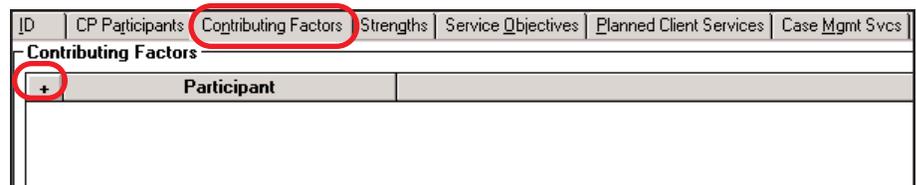
What the CSW does to help clients meet their Service Objectives.

Plan Ahead. Make those critical choices for your families before you start a CWS/CMS Case Plan. Remember: **Limit your selections** to those most relevant to any given client's particular situation and **add specifics** in the appropriate description boxes. Your considered choices will provide your clients with a clear understanding of what they need to do and a specific method of getting it done.

### Utilize the SDM Family Needs & Strengths Assessment

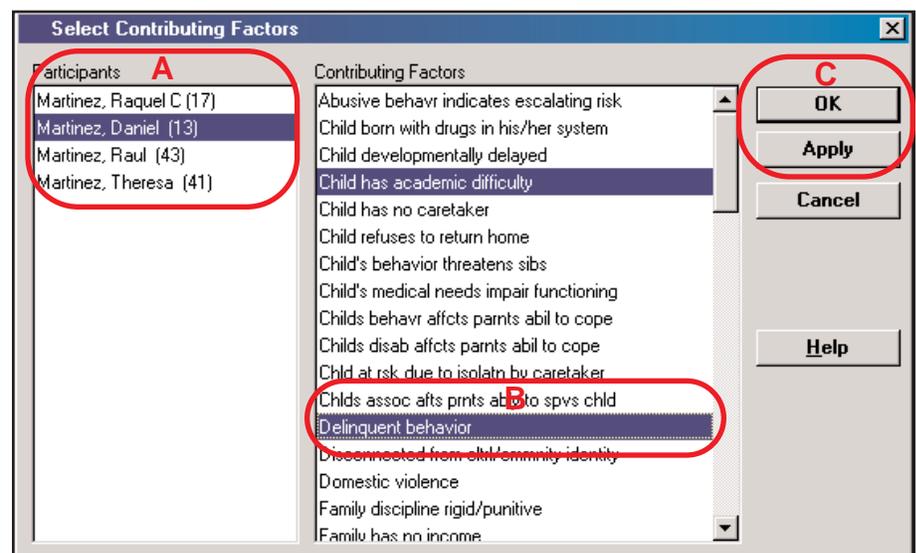
#### STEP 4. On the **Contributing Factors** Page:

**Click** on the "+" button on the top left hand corner of the grid, which will enable the Contributing Factors selection box.



#### Step 5. In the **Select Contributing Factors** selection box:

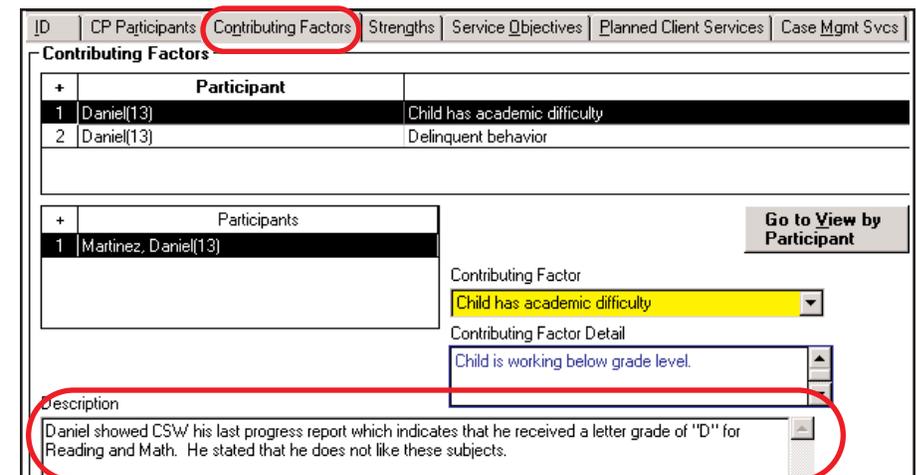
(A) **Select** participant(s)  
 (B) **Select** contributing factors  
 (C) **Click** "Apply" and repeat for each participant.  
 After making the final selection, click OK.



NOTE: You can multi-select participants and/or Contributing Factors.

#### STEP 6. On the **Select Contributing Factors** Page:

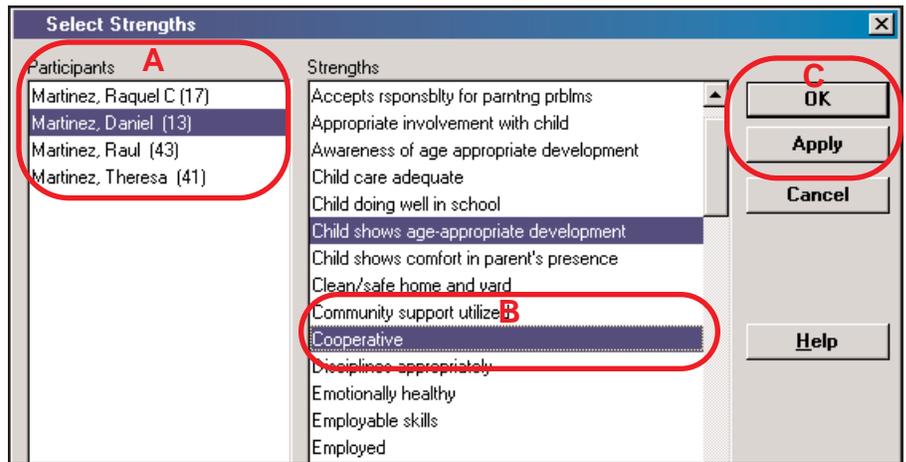
If additional descriptions are needed, **select** the contributing factor row in the grid box. **Click** into the description field at the bottom of the page and **enter** additional information.



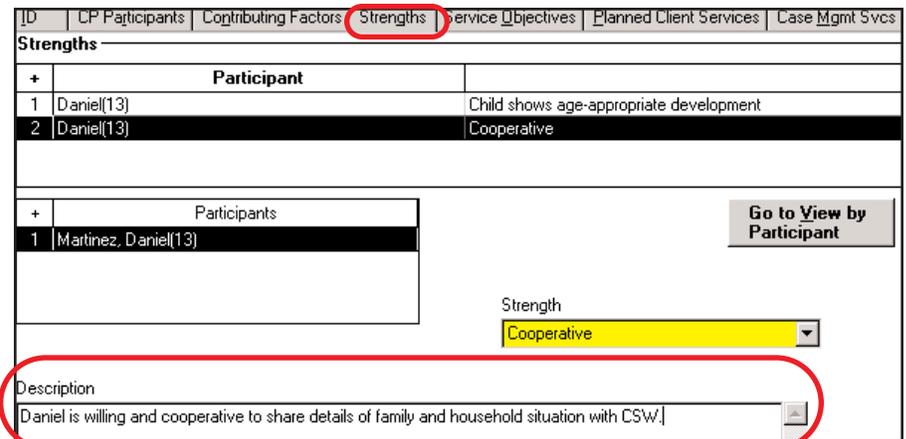
**STEP 7.** On the **Strength** Page: **Click** the “+” in the grid to enable the Select Strengths selection box.

- (A) **Select** participants
- (B) **Select** Strengths
- (C) **Click** “Apply” and repeat. After making final selection, click “OK”.

NOTE: You can multi-select participants and/or Strengths.



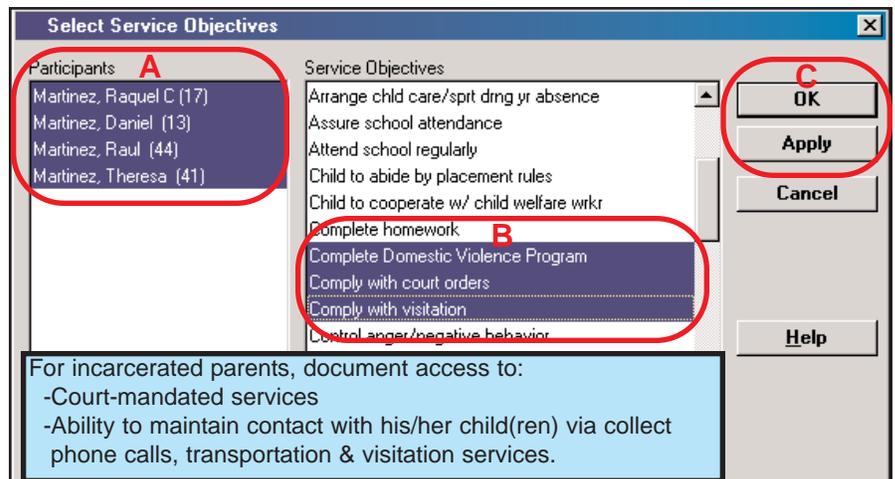
If additional descriptions are needed, **select** the row in the grid box. **Click** into the description field at the bottom of the page and **enter** additional information.



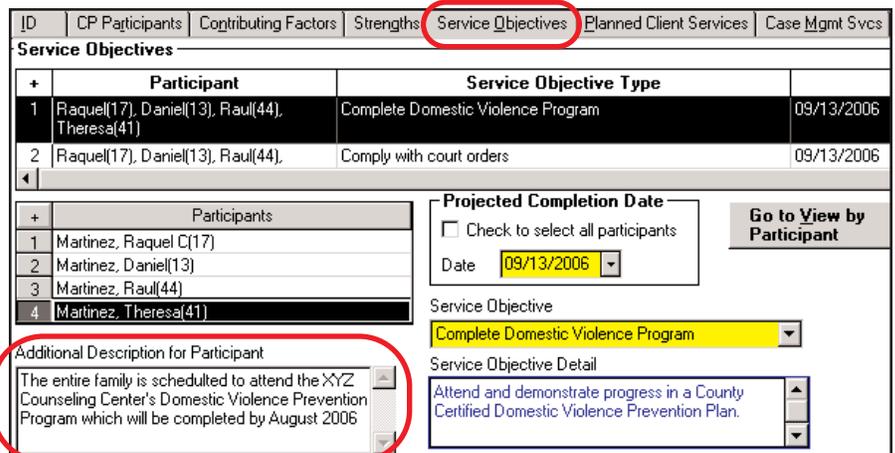
**STEP 8.** On the **Service Objectives** Page: **Click** the “+” in the grid to enable the Select Service Objectives selection box.

- (A) **Select** participants
- (B) **Select** Service Objectives
- (C) **Click** “Apply” and repeat. After making final selection, **click** “OK”.

NOTE: You can multi-select participants and/or Service Objectives.



If additional descriptions are needed, **select** the **Service Objective** row in the grid box. Then **click** into the description field at the bottom of the page and **enter** additional information.



**STEP 9.** On the **Planned Client Services** Page:

**Click** the “+” in the grid to enable the Select Planned Client Services selection box.

- (A) **Select** Category
- (B) **Select** Type
- (C) **Select** Participants
- (D) **Click** “Apply”. When one Category is completed return to step (A) and repeat. After making final selection, **click** “OK”.

NOTE: You can multi-select participants and types.

**Select Planned Client Services Participants**

If participants have different descriptions or schedules, please select them separately.

Category: Counseling/Mental Health Services

Type: Domestic Violence Program

Participants: Martinez, Raquel C (17), Martinez, Daniel (13), Martinez, Raul (44), Martinez, Theresa (41)

Buttons: OK, Apply, Cancel, Help

Include:

- Planned services to mitigate safety threats
- Court orders made at the detention hearing
- Name and address of service providers

On the **Planned Client Services** Page:

- (A) **Select** the Planned Client Services row.
  - (B) **Enter** the Occurrence and **select** the Frequency if needed.
  - (C) **Enter** additional description if needed.
- Repeat steps as needed.

ID	CP Participants	Contributing Factors	Strengths	Service Objectives	Planned Client Services	Case Mgmt Svcs
+						
1	Raquel(17), Daniel(13)					
+						
1	Martinez, Raquel C				Domestic Violence Program	Occurrence: 1, Frequency: Weekly
2	Martinez, Daniel(13)					
3	Martinez, Raul(44)					
4	Martinez, Theresa(41)					

Description/Responsibilities for Service: The family is scheduled to attend XYZ Counseling Center.

For Family Reunification case plans, Select "Family Preservation" for Category; Select "Other" for Type and enter the following under Description/ Responsibilities for Service text field:

"I, (Enter parent's name) agree to submit to Live-Scan at least 30 days prior to the next status review hearing to obtain criminal history information to assist the Court in determining the appropriateness of returning my child to my care."

**STEP 10.** On the **Case Management Services** Page, the SW Plan Contact is automatically added for the focus children.

NOTE: You will need to add a SW Plan Contact for the parent(s) and SCP.

**Click** the “+” in the grid to enable the Select Case Management Services selection box.

- (A) **Select** Category
- (B) **Select** Type
- (C) **Select** Participants
- (D) **Click** “Apply”. When one Category is completed return to step (A) and repeat. After making final selection, **click** “OK”.

NOTE: You can multi-select participants and types.

ID	CP Participants	Contributing Factors	Strengths	Service Objectives	Planned Client Services	Case Mgmt Svcs
+						
1	Raquel(17), Daniel(13)				Case Management Services	

Participants: Martinez, Raquel C(17), Martinez, Daniel(13)

Service: Category: Case Management Services, Type: SW Plan Contact

Schedule for Service: Start Date: 03/15/2006, End Date: 09/13/2006

Go to View by Participant

**Select Case Management Services**

If participants have different descriptions or schedules, please select them separately.

Category: Case Management Services

Type: Adoption

Participants: Martinez, Raquel C (17), Martinez, Daniel (13), Martinez, Raul (44), Martinez, Theresa (41)

Buttons: OK, Apply, Cancel, Help

Must select:

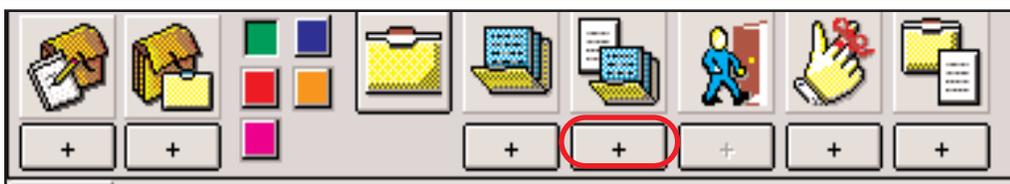
- Health/CHDP, education, visitation schedule for children
- Independent Living Program (ILP) for youths 14 years and over
- Concurrent planning services for FR cases
- Runaway/abducted child, document that whereabouts are unknown in the Contact Visitation Waivers field
- Efforts made to ensure educational stability under the category Educational Stability. See ACL 12-70 (December 7, 2012)

**STEP 11.** On the **Case Management Services** Page:

- (A) **Select** the Case Management Services row.
- (B) **Enter** the Occurrence and **select** the Frequency if needed.
- (C) **Enter** additional description if needed.
- (D) **Enter** the Contact/Visit section if necessary.

Repeat steps as needed.

The screenshot shows the 'Case Management Services' page. A table at the top lists services with columns for ID, Participant, and Category. Row 1 is highlighted. Below the table are sections for 'Participants', 'Service' (with dropdowns for Category and Type), 'Contacts/Visits' (with dropdowns for Contact Party and Contact Method), 'Agency Responsibilities for Service', and 'Schedule for Service' (with Start and End Date fields, Occurrences, and Frequency dropdowns). Red circles and letters A, B, C, and D highlight specific areas: A around the first row of the table, B around the Occurrences and Frequency fields, C around the Agency Responsibilities section, and D around the Contact Party and Contact Method dropdowns.



The 'Generate New Documents' dialog box shows a list of document types. The first item, 'Case Plan Family Assessment', is selected and highlighted with a red circle. The 'OK' button is also circled in red.

The 'Select Notebook' dialog box shows a table with columns for Effective Date, End Date, Status, and Focus Children. The first row is highlighted with a red circle. The 'OK' button is also circled in red.

**STEP 12.** **Click** on “Create New Document - Case Plan.

In the Generate New Documents dialogue box, **select Family Assessment**, then **click** OK.

In the Select Notebook dialogue box, **review** to ensure that the correct case plan row is highlighted, then **click** OK.

Complete the narrative fields in the Word Document. Use the **Sample Case Plan Family Assessment** for guidance. When the Family Assessment is complete, **save, close** the Word document and **click** on the Client Services icon on the task bar at the bottom of the screen.

**Repeat Step 12** for **Out-of-Home Care Information** document if needed. Use the **Sample Out of Home Care Information** document for guidance



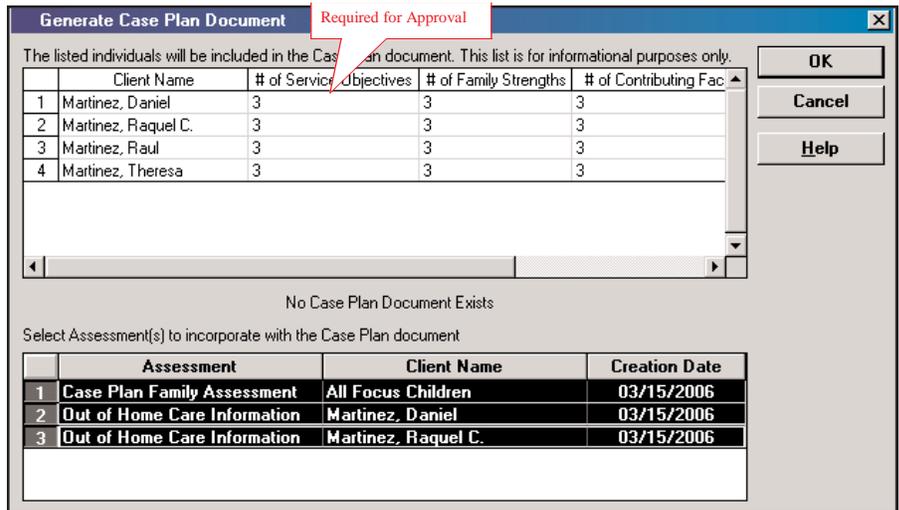
**STEP 13.** **Click** on “Create New Document - Case Plan.

In the Generate New Documents dialogue box, **select Child Welfare Services Case Plan**, then **click** OK.

In the Select Notebook dialogue box, **review** to ensure that the document is for the Case Plan in Progress, then **click** the OK button.

**STEP 14.** In the Generate Case Plan Document dialogue box: **Select** all assessment documents that were previously created and you want to incorporate into the Case Plan Document, then **click** the OK button.

**Review** the Case Plan Document for completeness. Use the **Sample Initial Case Plan** for guidance. **Save, close** the Word Document and **click** on the Client Services icon on the task bar at the bottom of the screen.



**STEP 15.** Approval.

(A) With the “in progress” Case Plan Note Book in focus, **click** on the “Action” drop down menu. **Click** on “Approval”. (If the word “Approval” is grayed out, check your CWS/CMS Quick Reference Guide, “Why Can’t I...” rules).

(B) In the Approval dialogue box, **select** “Pending Approval”, then **click** the OK button.

**CONGRATULATIONS!** Your Case Plan is ready to send to your supervisor.

(C) **Click** on the “File” drop down menu. **Select** “Save Locally” then “File” again from the drop down menu and **select** “Save to Database”.

