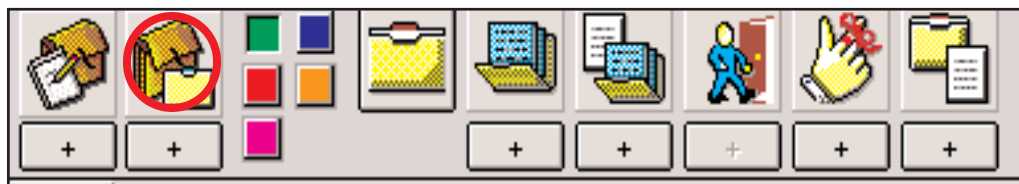


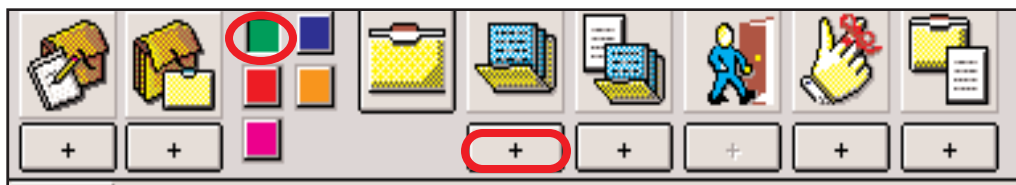
Creating a Case Plan Update

Division 31 regulations require that a case plan be updated at least every six months or whenever circumstances require a change in the current “In Effect” case plan. In order to create a Case Plan Update on CWS/CMS, at least one case plan (the Initial Case Plan) must have been completed and approved.

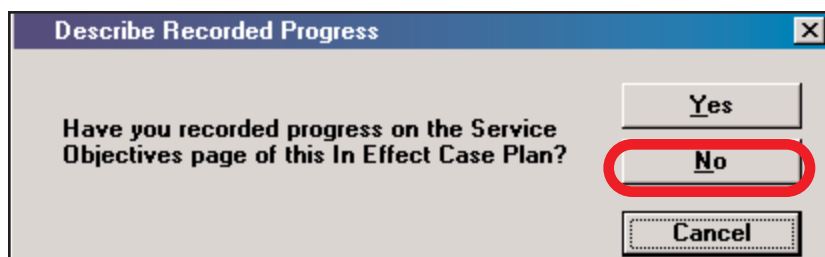
Before you begin a case plan update, always remember to complete case clean-up procedures to ensure that the correct information populates to data fields and documents.



STEP 1. *Click on Open Existing Case.* Retrieve the case(s) for the case plan focus child(ren).



STEP 2. In the green section, *click on Create New Case Plan.*



STEP 3. The Describe Recorded Progress dialog box appears, asking the question, “Have you recorded progress on the Service Objectives page of this “In Effect Case Plan”?”

Click No. CWS/CMS will open the “In Effect” case plan and display the Service Objectives page. NOTE: You can enter the progress of the “In Effect” case plan at any time. If this was completed prior to creating the update, click Yes in this dialog box to create the new case plan.

STEP 4.

(A) **Select** the service objective.

(B) **Record** and/or review progress in the “Met (for case plan update)” box **and**

(C) **Enter** narration in the “Progress (for case plan update)” text box.

Repeat (A) (B) & (C) for **EACH** service objective.

ID	CP Participants	Contributing Factors	Strengths	Service Objectives	Planned Client Services	Case Mgmt Svcs
Service Objectives						
	Participant	Service Objective Type				
4	Martinez, Daniel(13)	Complete Domestic Violence Program				06/19/2006
5	Martinez, Daniel(13)	Complete homework				06/19/2006
6	Martinez, Daniel(13)	Attend school regularly				06/19/2006
7	Martinez, Raul(43)	Complete Domestic Violence Program				06/19/2006

Met (for Case Plan Update)

Yes Not Determinable
 No In Progress

Projected Completion Date

Check to select all participants
 Date: 06/19/2006

Service Objective: Attend school regularly

Service Objective Detail: Attend school regularly. Any absences are to be excused. Only excused absences are acceptable.

Additional Description for Participant: [Empty]

Progress (for Case Plan Update): Daniel missed 3 days of school for the months of January through June. One absence was excused due to a dental exam and tooth extraction.

OK - Go to Update All Service Objectives Met/Progress recorded. Continue with Update

STEP 5.

When you have entered the progress for each service objective,

Click on the OK - Go to Update button.

This action will create a new case plan update, which will now be “in progress”.

Met (for Case Plan Update)

Yes Not Determinable
 No In Progress

Projected Completion Date

Check to select all participants
 Date: 06/19/2006

Service Objective: Complete Domestic Violence Program

Service Objective Detail: Attend and demonstrate progress in a County Certified Domestic Violence Prevention Plan.

Additional Description for Participant: [Empty]

Progress (for Case Plan Update): Daniel missed 3 days of school for the months of January through June. One of those absences was excused due to a dental exam and tooth extraction.

OK - Go to Update All Service Objectives Met/Progress recorded. Continue with Update

STEP 6.

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

(B) **Select** other participants. **Click** the bottom “Add” button.

(C) **Enter** start date for the case plan. NOTE: The Case Plan Update End Date will default to 6 months from Start Date. Edit if needed.

Stop!.... (take a breath, you fast clickers)....**Don't click** the “OK” button yet!

Select Case Plan Update Participants

All Related Clients	Updated Plan Focus Children
Martinez, Theresa (41)	Martinez, Daniel (13)
Martinez, Raul (43)	
Martinez, Raquel C (17)	

Participants include:
 -Child(ren)
 -All parent(s)/guardian(s) living in the home
 -Parent residing outside the home

Case Plan Update Start Date: 01/06/2006

Case Plan Update End Date: 07/07/2006

Service Objectives

Copy All
 Copy All Not Met
 Copy None

Copy All Family Strengths
 Copy All Contributing Factors
 Copy All Planned Services
 Copy Appropriateness Description

<input checked="" type="checkbox"/> Copy All Family Strengths <input checked="" type="checkbox"/> Copy All Contributing Factors <input checked="" type="checkbox"/> Copy All Planned Services <input checked="" type="checkbox"/> Copy Appropriateness Description	Service Objectives <input checked="" type="radio"/> Copy All <input type="radio"/> Copy All Not Met <input type="radio"/> Copy None
---	---

STEP 7.

At the bottom of the Select Case Plan Update Participants dialogue box are a set of check boxes and option buttons. These are time-saving choices that allow you to copy certain elements from the last Approved Case Plan into the “In Progress” case plan.

(A) Ensure that there are checks in all the boxes in the left-hand column to copy all Family Strengths, Contributing Factors, Service Objectives, and Appropriateness Description from the last “In Effect” case plan to this new “In Progress” case plan.

(B) Choose the correct option in this box to copy all, none, or only unmet Service Objectives into the new case plan.

Now you can Click the OK button.

ID	CP Participants	Contributing Factors	Strengths	Service Objectives	Planned Client Services	Case Mgmt Svcs
Identification						
Approval		Case Plan Update Appropriateness Description				
Approval Status	Date	The case plan goal to provide Family Maintenance Services in the home of the parents remains appropriate.				
Request Not Submitted		If the plan is kinship guardianship, document how the child meets the eligibility requirements.				
Effective Date	Next Review Date	NDA Date				
Participant Review						
	Participant Name	Review Date	Signed Date	Refused to Sign Date	Refused to Participate Date	
1	Martinez, Raquel C (17)	07/19/2005	07/19/2005			
2	Martinez, Daniel (13)					
3	Martinez, Raul (43)					
4	Martinez, Theresa (41)					
	Participant Name	Review Date	Signed Date	Refused to Signed Date	Refused to Participate Date	
	Martinez, Raquel C (17)	07/19/2005	07/19/2005			
	Reason Not Signed/Comments					

STEP 8.

CWS/CMS will then create the new Case Plan Update, displaying the ID page of the Case Plan notebook. If you asked CWS/CMS to copy the Appropriateness Description in the step 7., it will copy from the last Case Plan and display on this page. NOTE: If the previous case plan was an Initial Case Plan, the Appropriateness Description will be blank.

If necessary, **edit** or **enter** the the Appropriateness Description.

Enter the Participants Review dates and comments if not completed in the previous case plan.

ID	CP Participants	Contributing Factors	Strengths	Service Objectives	Planned Client Services	Case Mgmt Svcs									
Case Plan Participants															
	Participant	Case Plan Goal													
1	Martinez, Raquel C(17)	Return Home													
2	Martinez, Daniel(13)	Return Home													
3	Martinez, Raul(43)														
4	Martinez, Theresa(41)														
<table border="1"> <tr> <td>Case Plan Goal</td> <td>Assessed by Adoptions</td> <td>Current Service Component</td> </tr> <tr> <td>Return Home</td> <td> <input checked="" type="radio"/> Adoptable <input type="radio"/> Not Adoptable <input type="radio"/> Not Assessed </td> <td> Service Component Type Family Reunification Effective Date 04/22/1999 </td> </tr> </table>							Case Plan Goal	Assessed by Adoptions	Current Service Component	Return Home	<input checked="" type="radio"/> Adoptable <input type="radio"/> Not Adoptable <input type="radio"/> Not Assessed	Service Component Type Family Reunification Effective Date 04/22/1999			
Case Plan Goal	Assessed by Adoptions	Current Service Component													
Return Home	<input checked="" type="radio"/> Adoptable <input type="radio"/> Not Adoptable <input type="radio"/> Not Assessed	Service Component Type Family Reunification Effective Date 04/22/1999													
<table border="1"> <tr> <td>Permanency Alternative</td> <td>Concurrent Planning</td> <td>Projected Child Termination Date</td> </tr> <tr> <td>Adoption</td> <td></td> <td>06/22/2007</td> </tr> <tr> <td colspan="3"> <None> Adoption Adoption With Sibling(s) Legal Guardianship Long Term Foster Care with Non-Relative Long Term Foster Care with Relative Maintain minor with Guardian Remain Home Return Home </td> </tr> </table>							Permanency Alternative	Concurrent Planning	Projected Child Termination Date	Adoption		06/22/2007	<None> Adoption Adoption With Sibling(s) Legal Guardianship Long Term Foster Care with Non-Relative Long Term Foster Care with Relative Maintain minor with Guardian Remain Home Return Home		
Permanency Alternative	Concurrent Planning	Projected Child Termination Date													
Adoption		06/22/2007													
<None> Adoption Adoption With Sibling(s) Legal Guardianship Long Term Foster Care with Non-Relative Long Term Foster Care with Relative Maintain minor with Guardian Remain Home Return Home															

STEP 9.

Complete the remainder of the Case Plan notebook pages as in the Initial Case Plan process. On the CP Participants page:

- (A) **Select** child's row and enter the case plan goal for each case plan focus child.
- (B) **Enter** the concurrent case plan goal for each case plan focus child.
- (C) **Select** an option button in the Assessed by Adoptions box.

ID	CP Participants	Contributing Factors	Strengths	Service Objectives	Planned Client Services	Case Mgmt Svcs						
Contributing Factors												
	Participant	Contributing Factor										
+												
1	Raquel(17)	Child refuses to return home										
2	Daniel(13)	Delinquent behavior										
3	Raquel(17), Daniel(13), Raul(43), Theresa(41)	Domestic violence										
<table border="1"> <tr> <td>+</td> <td>Participants</td> <td>Go to View by Participant</td> </tr> <tr> <td>1</td> <td>Martinez, Raquel C(17)</td> <td></td> </tr> </table>							+	Participants	Go to View by Participant	1	Martinez, Raquel C(17)	
+	Participants	Go to View by Participant										
1	Martinez, Raquel C(17)											
<table border="1"> <tr> <td>Contributing Factor</td> <td>Description</td> </tr> <tr> <td>Child refuses to return home</td> <td>Child refuses to return to the home of the parent/guardian.</td> </tr> </table>							Contributing Factor	Description	Child refuses to return home	Child refuses to return to the home of the parent/guardian.		
Contributing Factor	Description											
Child refuses to return home	Child refuses to return to the home of the parent/guardian.											

STEP 10.

On the Contributing Factors page:

- (A) **Review** the Contributing Factor for each case plan focus child.
- (B) **Edit** (add or delete) the Contributing Factor according to the case plan for each child.
- (C) If additional descriptions are needed, select factor in the grid box. **Click** into the description field at the bottom of the page and **enter** additional information.

STEP 11.

On the Strength, Planned Client Services and Case Management Services pages:

- Review** the strength and services for each case plan focus child and participant.
- Edit** (add, delete or change the frequency/occurrences) according to the case plan for each focus child and participant.
- If additional descriptions are needed, select factor in the grid box. **Click** into the description field at the bottom of the page and **enter** additional information.
- Under Planned Client Services**, document progress in Family Preservation and other specialized programs.
- Under Case Management Services**, document efforts made to ensure educational stability.
See ACL 12-70 (December 7, 2012)
- Under Case Management Services for NMDs** document the placement of the Supervised Independent Living Plan. **Select** "Arrange and Maintain Placement" and under the "Agency Responsibilities for Services" enter the type of SILP setting.

NOTE: You already completed the Service Objectives page when you created the new case plan update or you completed it prior to creating the update. **For Non-Minor Dependents**, select "Other Service Objective." In the "Additional Description for Participant", add: "During the next six-month period, the youth intends to remain eligible for extended foster care by completing the following case plan activities:" [enter at least one of the participation criteria].

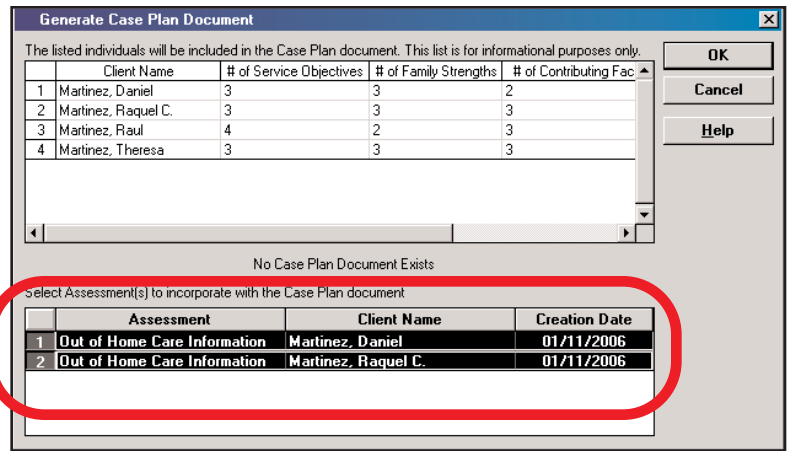
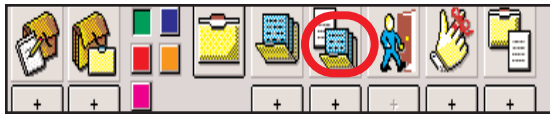
STEP 12.

Click on the + button of the "Create New Document-Case Plan" notebook. In the Generate New Documents dialogue box, **select** Out of Home Care Update for **each** focus child for the Case Plan In Progress, then **click** OK.

Use the **Sample Out of Home Care Information Update** document for guidance

If necessary, **complete** the narrative fields in the Word Document. When completed, save, close and click on the client services icon on the task bar at the bottom of the screen.



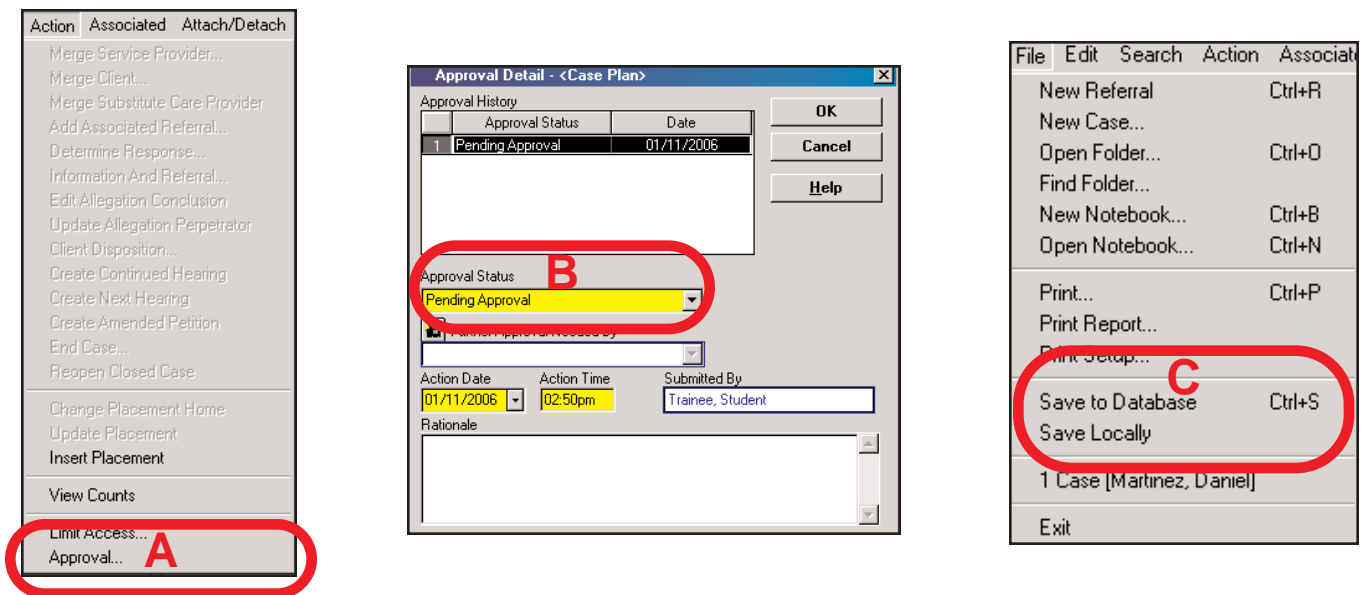


STEP 13.

Click on the + button of the “Create New Document-Case Plan” notebook. In the Generate New Documents dialogue box, **select** Child Welfare Services Case Plan Update for the Case Plan In Progress, then **click** OK. Use the **Sample Case Plan Update document** for guidance.

In the Generate Case Plan Document dialogue box, **select** all assessment documents that you previously created and want to incorporate into the Case Plan Document.

If necessary, **complete** the narrative fields in the Word Document. When completed, save, close and click on the client services icon on the task bar at the bottom of the screen.



STEP 14.

(A) **Click** on the “Action” drop down menu. **Click** on “Approval”. (If “Approval” is grayed out, check rules on the Quick Reference Guide under “Why Can’t I....Request Approval for a Case Plan Update?”).

(B) In the Approval Detail - Case Plan dialogue box, **select** “Pending Approval, then **click** OK.

(C) **Click** on the “File” drop down menu. **Select** “Save Locally” then **click** on “File” again from the drop down menu and **select** “Save to Database”. The Case Plan Status changes to “In Effect”.