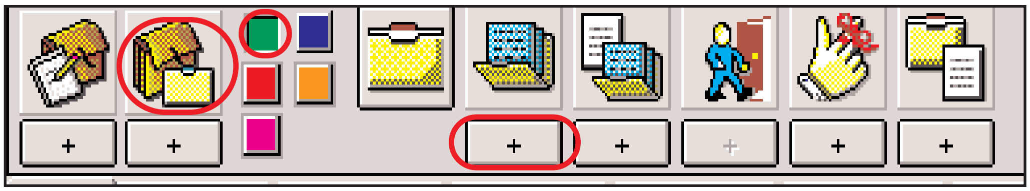
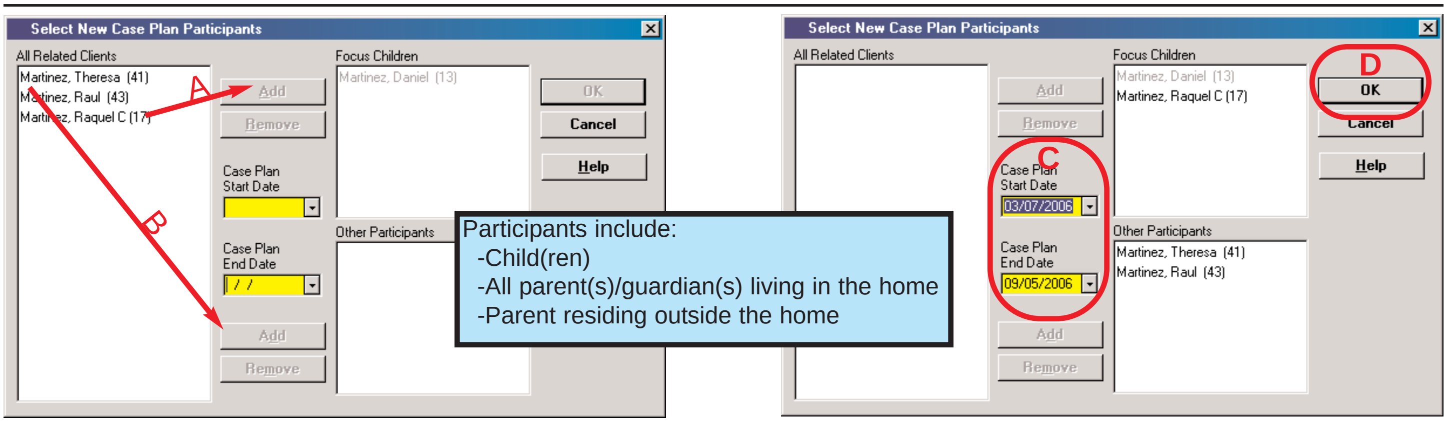
Creating an Initial Case Plan

DCFS Training Center

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.

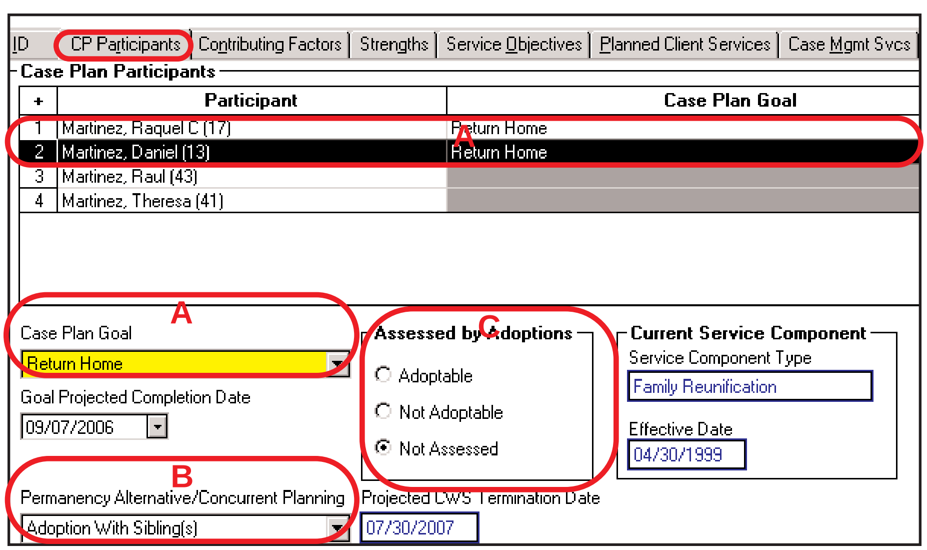


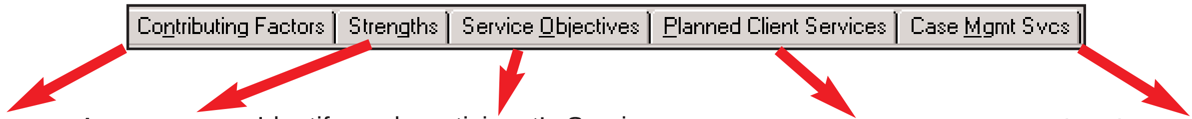
STEP 1. ***Click*** on ***Open Existing Case***. ***Retrieve*** the case(s) for the case plan focus child(ren). In the green section, ***click*** on the "+" button to ***Create New Case Plan.***



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.





Assessment Needs

Assessment Strengths

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

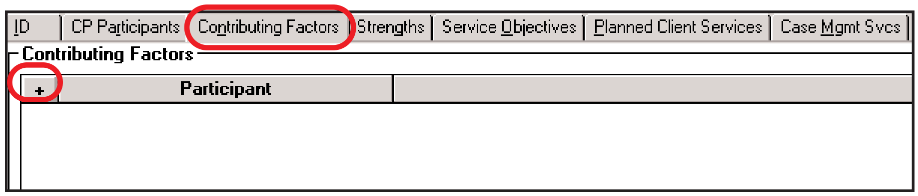
What it takes to get participants to their Service Objectives by the next Case Plan Update.

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

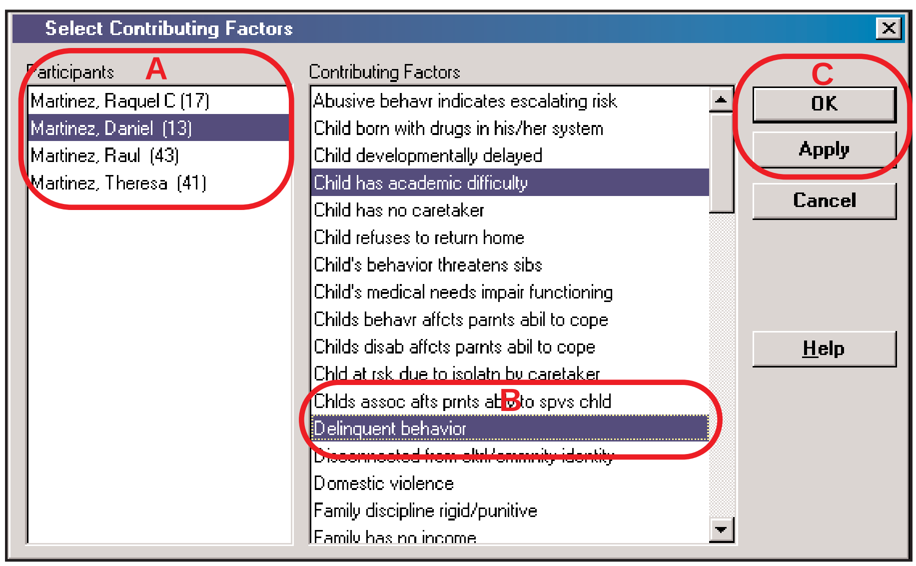
STEP 4. On the **Contributing Factors** Page:
Click on the "+" button on the top left hand corner of the grid, which will enable the Contributing Factors selection box.



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

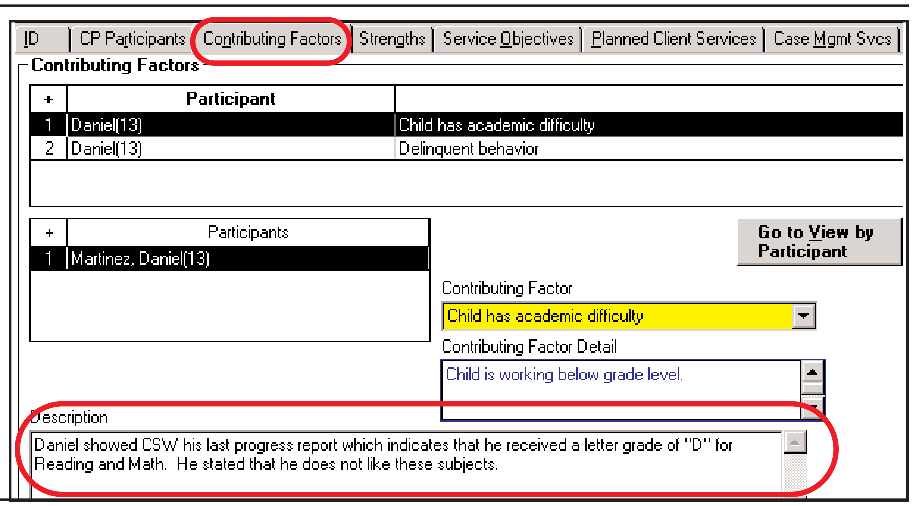
(A) ***Select*** participant(s)
(B) ***Select*** contributing factors
(C) ***Click*** "Apply" and repeat for each participant.
After making the final selection, click OK.

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



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

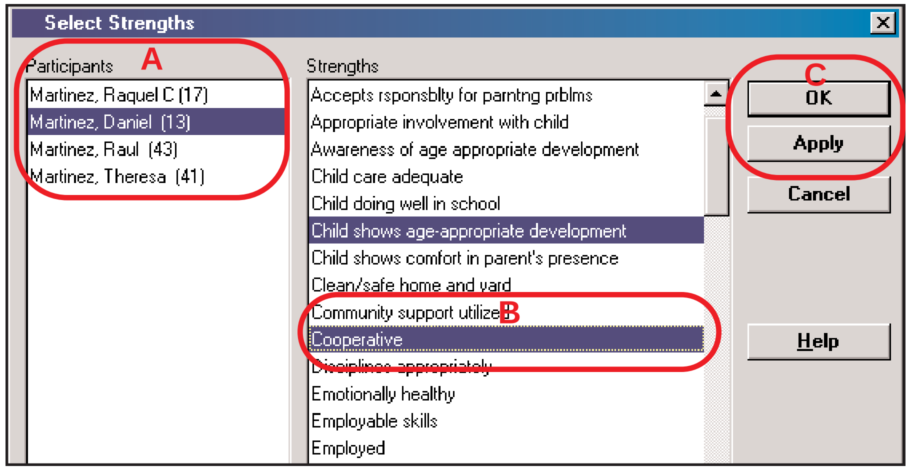
If additional descriptions are needed, ***select*** the contributing factor row in the grid box. ***Click*** into the description field at the bottom of the page and ***enter*** additional information.



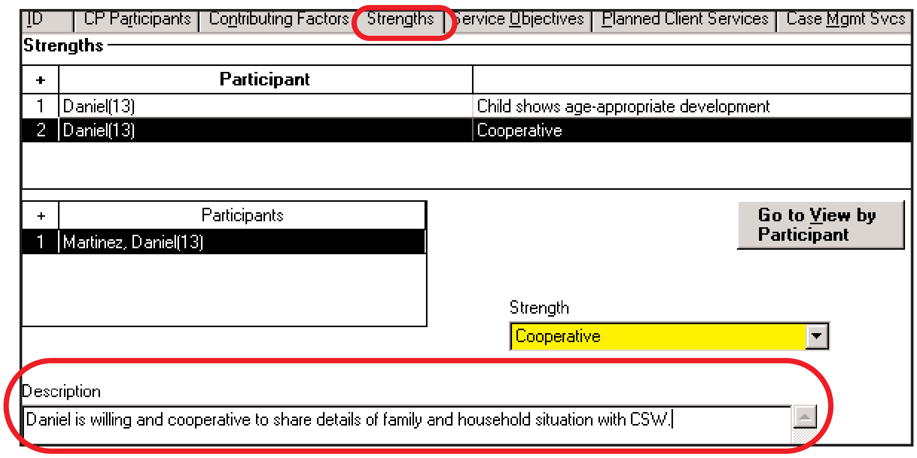
STEP 7. On the **Strength** Page:
Click the "+" in the grid to enable the Select Strengths selection box.

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

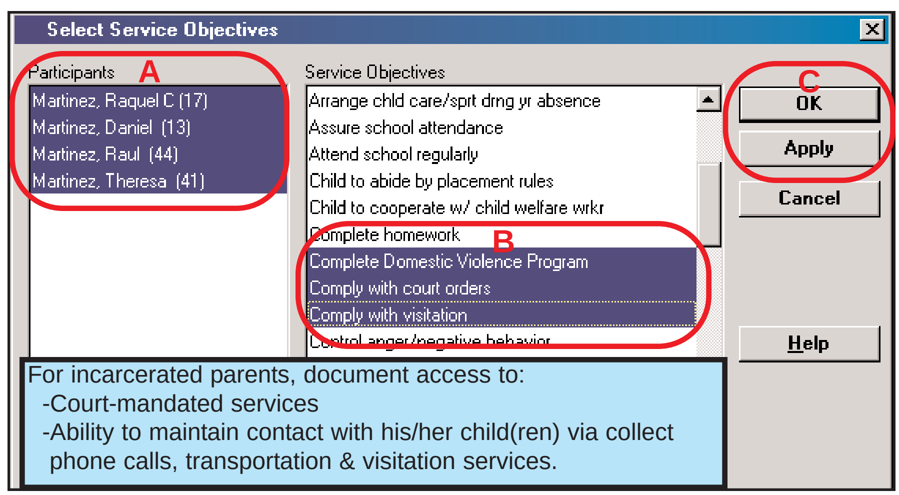
NOTE: You can multi-select participants and/or Strengths.



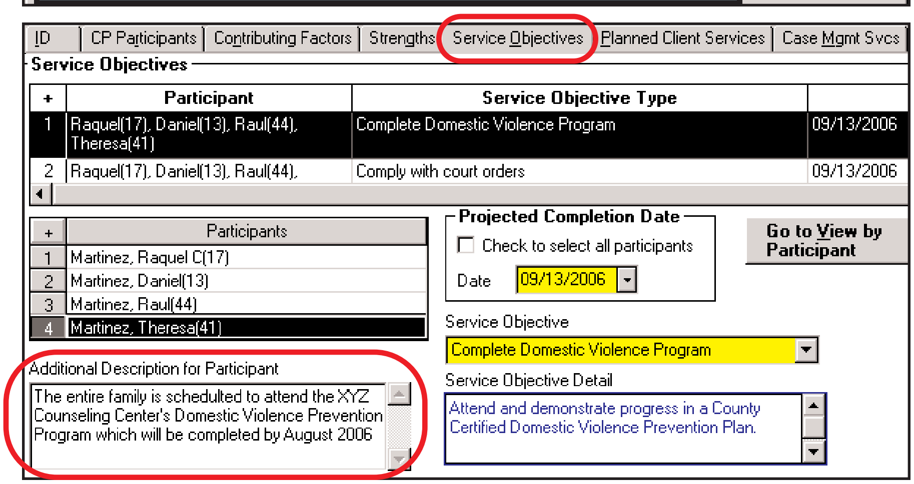
If additional descriptions are needed, ***select*** the row in the grid box. ***Click*** into the description field at the bottom of the page and ***enter*** additional information.



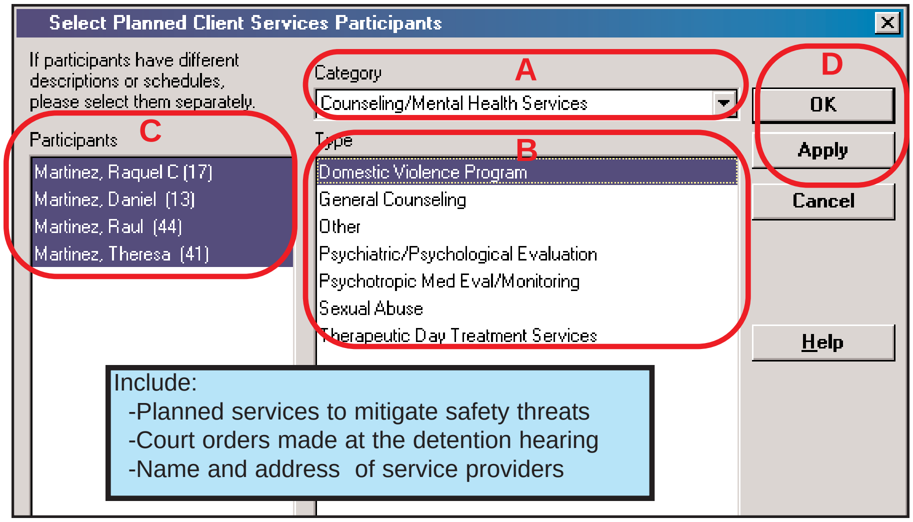
STEP 8. On the **Service Objectives** Page:
Click the "+" in the grid to enable the Select Service Objectives selection box.
(A) ***Select*** participants
(B) ***Select*** Service Objectives
(C) ***Click*** "Apply" and repeat. After making final selection, ***click*** "OK".
NOTE: You can multi-select participants and/or Service Objectives.



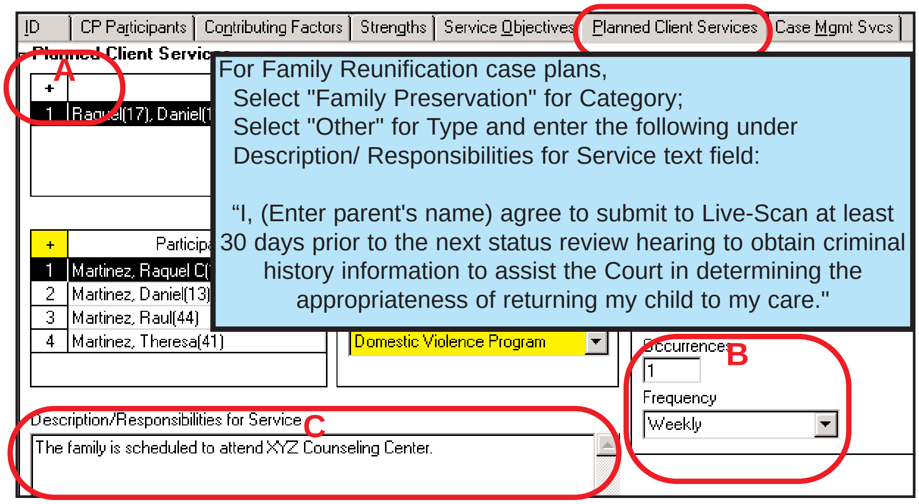
If additional descriptions are needed, ***select*** the **Service Objective** row in the grid box. Then ***click*** into the description field at the bottom of the page and ***enter*** additional information.



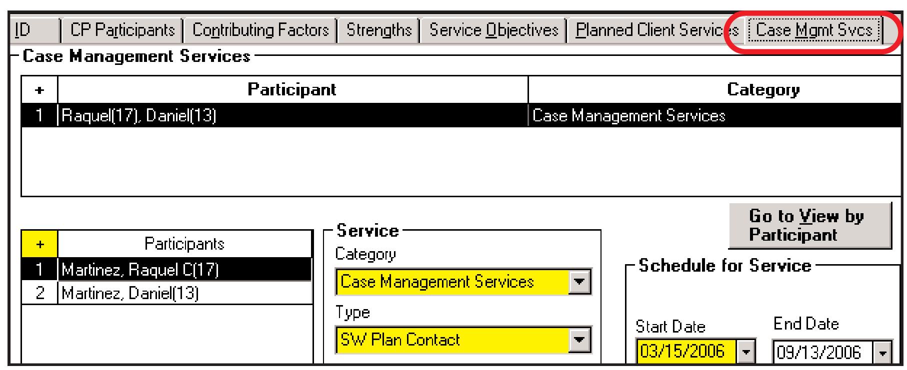
STEP 9. On the **Planned Client Services** Page:
Click the "+" in the grid to enable the Select Planned Client Services selection box.
(A) ***Select*** Category
(B) ***Select*** Type
(C) ***Select*** Participants
(D) ***Click*** "Apply". When one Category is completed return to step (A) and repeat. After making final selection, ***click*** "OK".
NOTE: You can multi-select participants and types.



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.



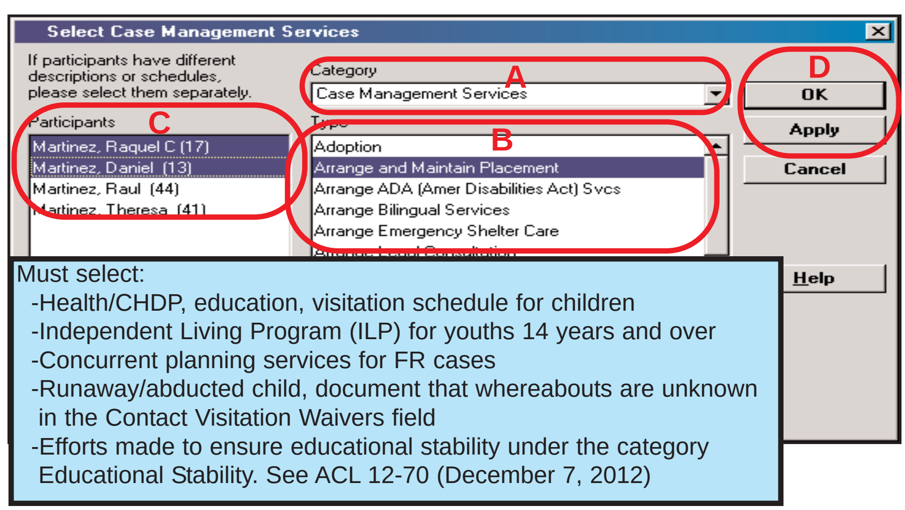
STEP 10. On the **Case Management Services** Page, the SW Plan Contact is automatically added for the focus children.
NOTE: You will need to add a SW Plan Contact for the parent(s) and SCP.



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".

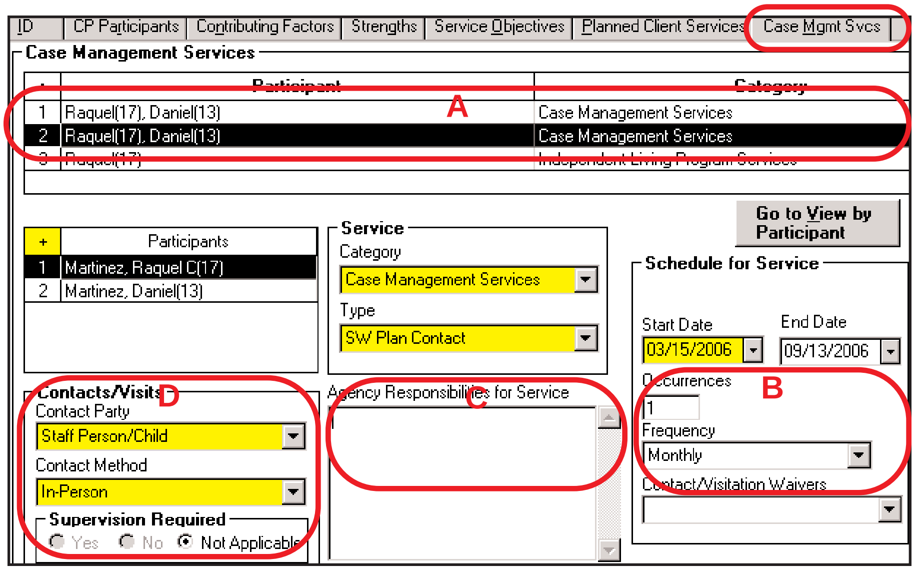
NOTE: You can multi-select participants and types.

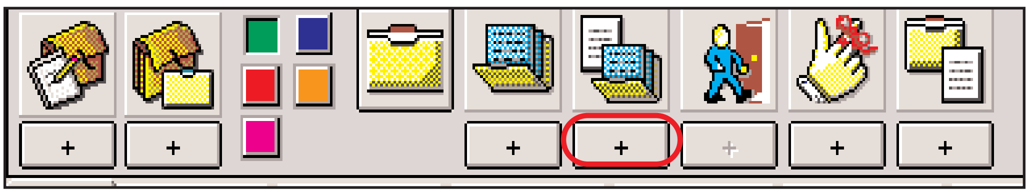


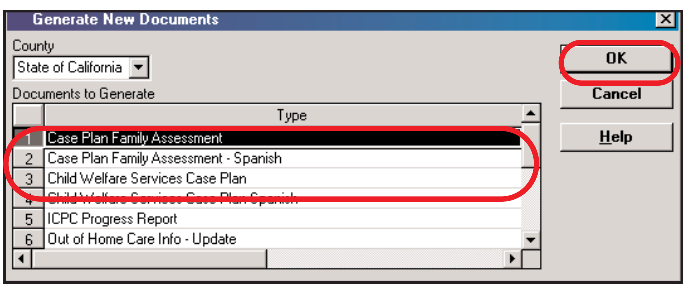
STEP 11. On the Case Management Services Page:

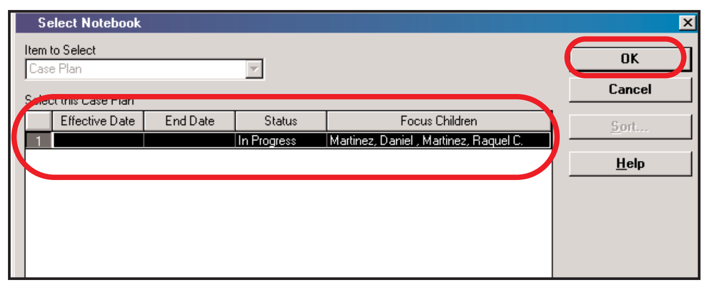
(A) ***Select*** the Case Management Services row.
(B) ***Enter*** the Occurrence and ***select*** the Frequency if needed.
(C) ***Enter*** additional description if needed.
(D) ***Enter*** the Contact/Visit section if necessary.

Repeat steps as needed.

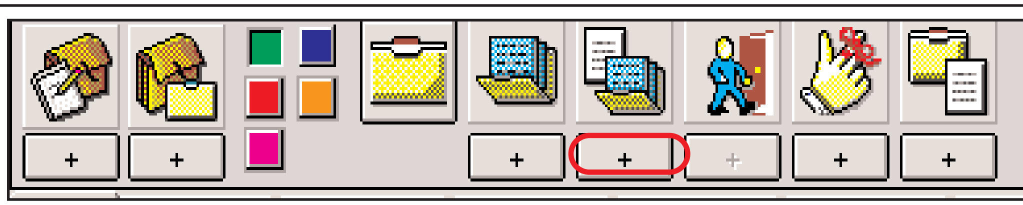








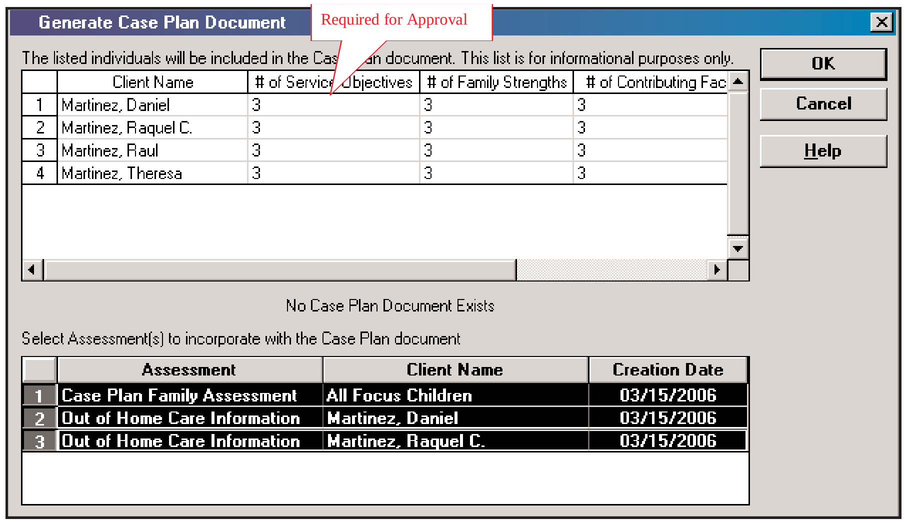
STEP 12. ***Click*** on "Create New Document - Case Plan.
In the Generate New Documents dialogue box, ***select*** Family Assessment, then ***click*** OK.
In the Select Notebook dialogue box, ***review*** to ensure that the correct case plan row is highlighted, then ***click*** OK.
Complete the narrative 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 **<u>Sample Initial Case Plan</u>** for guidance. ***Save, close*** the Word Document and ***click*** on the Client Services icon on the task bar at the bottom of the screen.

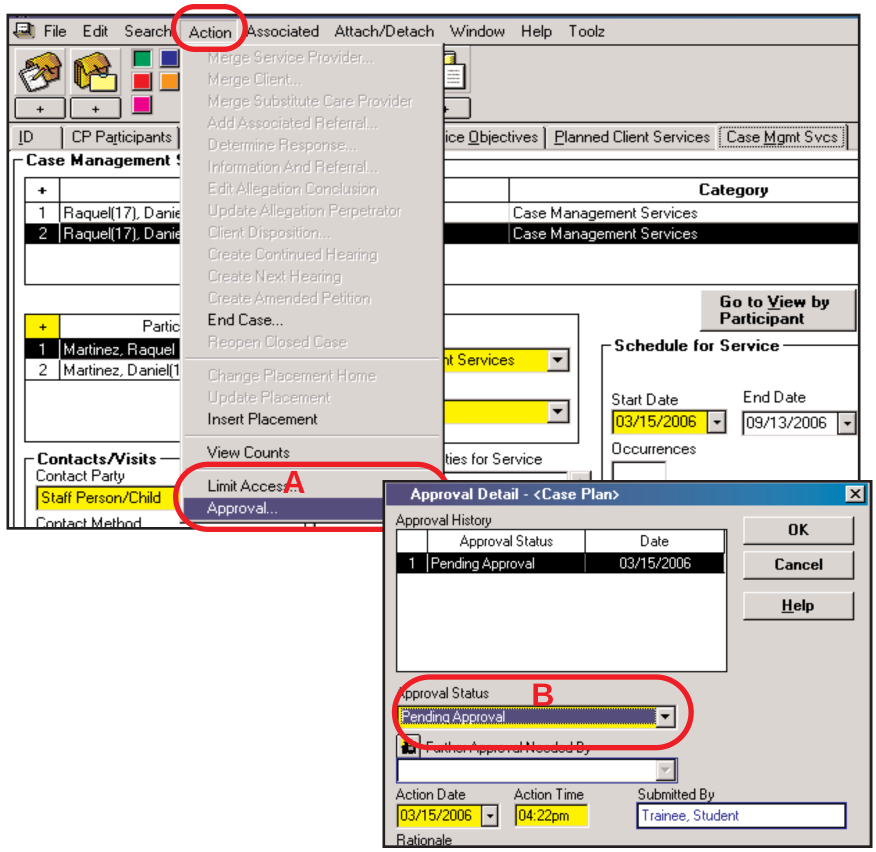


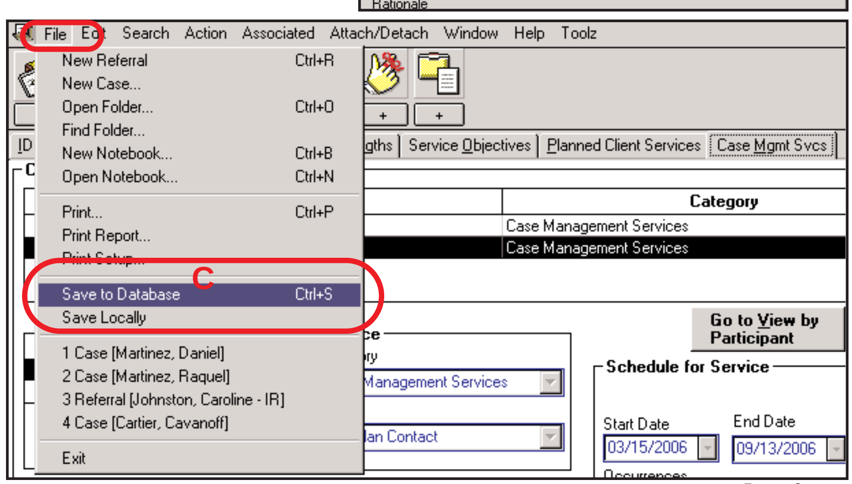
STEP 15. Approval.

(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".





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