

Updated Case Plan

Updated Case Plan

This chapter will present an updated Case Plan and an updated case plan document. Case Plans may be updated as often as necessary to meet the needs of the family or child, but **must** be updated at least once every six months. Usually the Case Plan updates are times that correspond to status review hearings for Court cases. The State does not require Case Plans for incoming ICPC cases as these are viewed as courtesy supervision for the sending state. In consideration of creating a Case Plan for an incoming ICPC, there is a document named ICPC Report that is available as a Case Plan document if a Case Plan has already been created for an incoming ICPC case.

Prior to creating the “Updated Case Plan” and the corresponding Court report, use the assessment tools used by the County. For most counties, that is **Structured Decision Making (SDM)**. Use of the tools will assist in determining if the child should be returned home when the child is in out-of-home placement, or if the child is in-home, should the case be closed. Based upon the child’s status, different tools will be used.

If the child or children are in out-of-home placement, use the “Out-of-Home Reassessment” tool. If the child or children are in-home, use the “In-Home Reassessment” tool. Prior to closing a case, also use the “Safety Reassessment” tool. If the child is going to Permanent Planning (PP), the “PP Child Strengths and Needs” tool should be used to help identify the child’s specific needs since that would be the focus of the new or updated Case Plan.

In the training example case, the child is in out-of-home care. Therefore, the “Out-of-Home Reassessment” is shown here. Open the application “SDM.” This is usually done by clicking on an icon on the desktop or by opening the internet browser and selecting SDM from a list of “Favorites.” Counties may be using other means of opening SDM. When SDM is open, the “Main Menu” page will display. All cases assigned to the user will be listed.

SDM
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Main Menu

TRAINING
 Extract Date: 02/21/2006
 Server: NCCDWWW2

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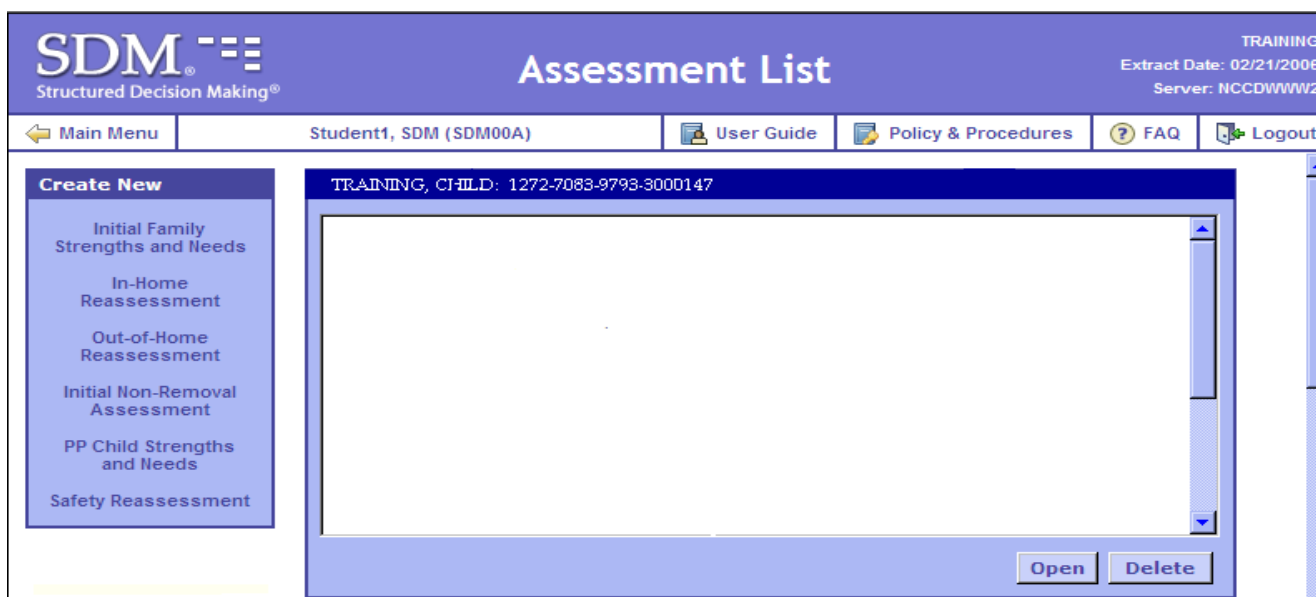
My Caseload

C/R	Referral/Case ID	Name	Start	Type	P/S
Referral	3274-	00036	5/1/2004	Immediate	P
Case	2703-	00036	6/13/2001	FR	P
Referral	2703-	00036	10/26/2004	Immediate	P
Case	2703-	00036	12/22/2000	FR	P
Case	2703-	00036	4/1/1998	FR	P
Case	2703-	00036	4/19/2003	FR	P
Case	3274-	00036	5/1/2004	FM	P

Open Assessment List

The example above is roughly half the page. On the bottom will be a listing of assessments that need some attention. For training purposes, identifying information has been deleted from the example as well as the hints section at the left of the page. Click on the case that the new Case Plan is for, and then click on the “Open Assessment List” button below the case listing.

Open Assessment List



This will result in the “Assessment List” page or screen shown above. Again, this is half of the screen. On the second half of the screen, “Associated Referrals” and “Siblings” will each be shown in separate frames. Additionally, any assessments requiring attention for the selected case will appear in the frame shown in the example.

It should be noted again, as previously with SDM examples, this is **not** SDM training. It is an example of the coordination between SDM and CWS/CMS, and how the SDM tools can be used in conjunction with CWS/CMS. The screen shown above is for training purposes only. The client is imaginary and other than for training purposes does not exist in the CWS/CMS production database.

To the right of the case listing is the “Create New” frame. This lists the tools that can be created for cases listed in the case listing. It is from this list that the correct tool will be selected.

Create New

- Initial Family Strengths and Needs
- In-Home Reassessment
- Out-of-Home Reassessment
- Initial Non-Removal Assessment
- PP Child Strengths and Needs
- Safety Reassessment

For this exercise, select “Out-of-Home Reassessment,” by clicking on it. That will result with a new SDM screen.

The “Household Information” screen lists the household members and allows the selection of who is being reassessed. Click the Household Members to be assessed. Then click the appropriate radial button in the far right column for each member assessed.

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Household Information

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HOUSEHOLD MEMBERS

Instructions: First, enter the household name and indicate if it is a removal household or a non-removal household. Next, mark the check box next to each family member involved in the reassessment. Finally, indicate the role each included person plays in the household (Primary Caregiver, Secondary Caregiver, Child, or Other).

Household Name:

Removal Household? ☒ Yes ☐ No

Household Members	Client ID	Birth Date	Relationship	Has Case	PC	SC	Child	Other
<input checked="" type="checkbox"/>			Focus Child	Yes	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/>			Father	No	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>					<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>			Mother	Yes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

PC = Primary Caregiver SC = Secondary Caregiver

[Next](#) [Cancel](#)

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Reunification Reassessment

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Case ID:		Assessment Date:	02/18/2010
Case Name:		Approving Unit:	
Created:	2/18/2010 by Student1, SDM		
Approval Status:	Incomplete	County of Completion:	
		Last Update:	2/18/2010 by Student1, SDM
Household Name:	Training		

This is an identification portion. Below this is the beginning of the reassessment. Complete the date in this section.

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Reunification Reassessment

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PART A: RISK REASSESSMENT

INSTRUCTIONS: Complete the following three items. For item R1, refer to the risk level on the most recently completed Risk Assessment. Answer items R2 and R3, consider the period of time since the last assessment/reassessment.

	SCORE
R1. Risk Level on Most Recent Referral (not reunification risk level or risk reassessment)	4
<input type="radio"/> a. Low	0
<input type="radio"/> b. Moderate	3
<input checked="" type="radio"/> c. High	4
<input type="radio"/> d. Very High	5
R2. Has There Been a New Substantiation since the Initial Risk Assessment or Last Reunification Reassessment?	0
<input checked="" type="radio"/> a. No	0
<input type="radio"/> b. Yes	2
R3. Progress Toward Case Plan Goals	0
<input type="radio"/> a. Successfully met all case plan objectives and routinely demonstrates desired behavior	-2
<input type="radio"/> b. Actively participating in programs; routinely pursuing objectives detailed in case plan; frequently demonstrates desired behavior	-1
<input checked="" type="radio"/> c. Partial participation in pursuing objectives in case plan; occasionally demonstrates desired behavior	0
<input type="radio"/> d. Refuses involvement in programs or has exhibited a minimal level of participation with case plan; rarely or never demonstrates desired behavior	4
TOTAL REUNIFICATION RISK SCORE	4

Incomplete Save Close

To the left is the “Risk Reassessment” portion of the tool. By selecting the appropriate radial button for each question, the SDM application can score the answers.

California SDM: reunification reassessment

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Reunification Reassessment

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PART B: SCORING AND OVERRIDES

REUNIFICATION RISK LEVEL

7 Risk Level: **High**

OVERRIDES

INSTRUCTIONS: Select the applicable override choice for the current review period. If there are no overrides, select "No Overrides" (1); Risk Level will remain the same. If there is a Policy Override, select the appropriate override (2-5); the Risk Level will increase to Very High. If you select a Discretionary Override (6), select the new Risk Level (one level higher or one level lower), and enter a reason in the box provided.

No Overrides (no change to risk level)

☒ 1. No overrides

Policy Overrides (increases risk level to Very High)

☐ 2. Sexual abuse; perpetrator has access to child and has not successfully completed treatment

☐ 3. Non-accidental physical injury to an infant, and caregiver has not successfully completed treatment

☐ 4. Serious non-accidental physical injury requiring hospital or medical treatment, and caregiver has not successfully completed treatment

☐ 5. Death of a sibling as a result of abuse or neglect in the household, and caregiver has not successfully completed treatment

Discretionary Overrides (risk level may be adjusted up or down one level)

☐ 6. Discretionary Override

Override Risk Level: ☐ Lower ☒ Higher

Incomplete Save Close

On this part of the page, it is possible to view the new risk level and override the application if appropriate. The next portion of the application deals with visitation evaluation. Determine the visitation evaluation by completing two drop down menus.

CHILDREN	VISITATION		OVERRIDES		
Child Name	NA	7 Compliance	7 Quality	Pol	Dis
	<input type="checkbox"/>	<div> <div></div> <div> Totally Routinely Sporadically Rarely or Never </div> </div>	<div> <div></div> <div> Strong Adequate Limited Destructive No Visitation </div> </div>	<input type="checkbox"/>	<input type="checkbox"/>

Based on the two choices, one from each column, the application will determine if the visitation was acceptable. This will be clear because the SDM application will place either a green arrow or a red check next to the Child's name and change the color of the child's name to match.

CHILDREN	VISITATION			OVERRIDES	
Child Name	NA	? Compliance	? Quality	Pol	Dis
✖ Child's Name	<input type="checkbox"/>	Sporadically	Limited	<input type="checkbox"/>	<input type="checkbox"/>

✓ = Acceptable Visitation ✖ = Not Acceptable Visitation NA = Child not in Care Pol = Policy Dis = Discretionary

Next, use a decision tree to determine if based upon the preceding answers, reunification or continued out-of-home placement is the better recommendation.

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SECTION 3: REUNIFICATION SAFETY ASSESSMENT
Reunification Safety Assessment Not Required

SECTION 4: REUNIFICATION RECOMMENDATION
PART A: RECOMMENDATION SUMMARY

Instructions: For each child, press the 'Decision Tree' button to open the permanency plan guidelines.

Child Name	Guidelines	Recommendation	Returned to Non-Removal
Child Training	Decision Tree	To Be Determined	<input type="checkbox"/>


Each child's "Decision Tree" button is disabled until his/her visitation plan evaluation has been completed.

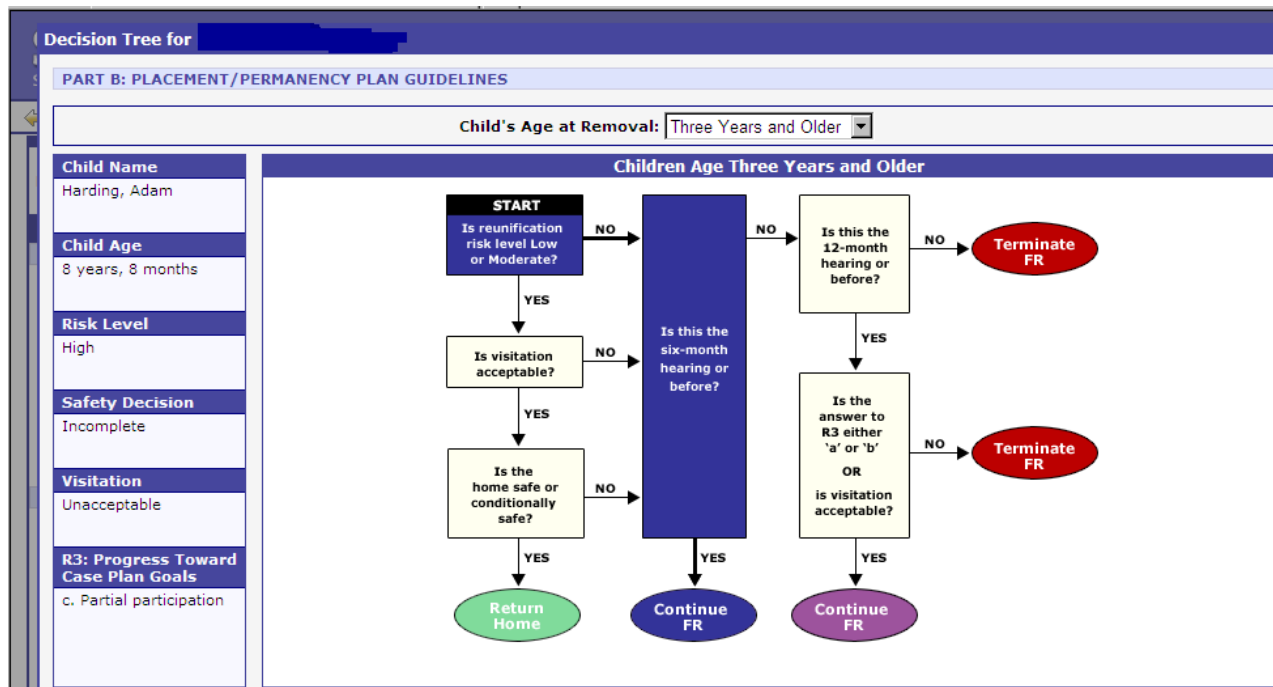
PART D: SIBLING GROUP

Instructions: You may choose to give all children the same recommendation by treating them as a sibling group. If at least one child under the age of three at the time of removal has a recommendation of "Terminate Family Reunification Services" and at least one other child has any other recommendation, all children may be considered a sibling group when making the final permanency plan recommendation.


Treat as sibling group?

- ☐ No
- ☐ Yes, the recommendation for all children will be "Terminate Family Reunification Services"

Clicking on the decision tree button  Decision Tree will result in the following screen.



In the example above, the decision was to “Continue FR.” After determining that there are no overrides (always an option), click on the “OK” button on the bottom of the screen.



Reunification Reassessment

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Reunification Safety Assessment Not Required

SECTION 4: REUNIFICATION RECOMMENDATION

PART A: RECOMMENDATION SUMMARY

Instructions:

For each child, press the 'Decision Tree' button to open the permanency plan guidelines.

Child Name	Guidelines	Recommendation	Returned to Non-Removal
Training, Child	 Decision Tree	Continue Services	<input type="checkbox"/>

Each child's "Decision Tree" button is disabled until his/her visitation plan evaluation has been completed.

PART D: SIBLING GROUP

Instructions:

You may choose to give all children the same recommendation by treating them as a sibling group. If at least one child under the age of three at the time of removal has a recommendation of "Terminate Family Reunification Services" and at least one other child has any other recommendation, all children may be considered a sibling group when making the final permanency plan recommendation.

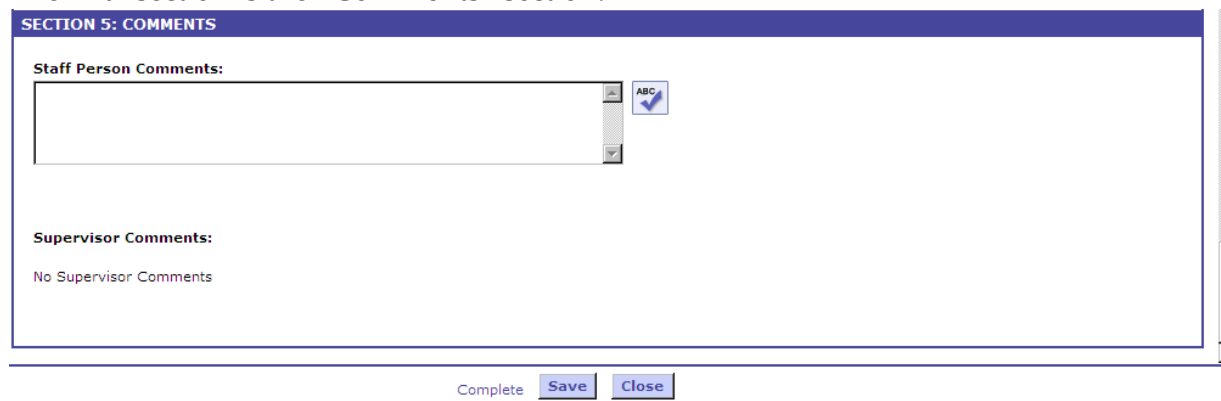
Treat as sibling group?

1. ☒ No

2. ☐ Yes, the recommendation for all children will be "Terminate Family Reunification Services"

The recommendation will have been changed from “To Be Determined” to “Continue Services.”

The final section is the “Comments” section.



SECTION 5: COMMENTS

Staff Person Comments:

Supervisor Comments:

No Supervisor Comments

Complete Save Close

Enter any comments desired. Next, click on the “Save” button. The application will save the completed tool, and the screen will return except that the save and close buttons will now change to

Complete Save Close Print View Request Approval

In most counties, the document is printed first then the “Request Approval” button is clicked. Learn your county practice.

The other SDM tools work in similar fashion. The “In-Home Reassessment” will recommend continuing services or closing the case. Remember, if closing a case; use the “Safety Reassessment” tool first.

Now that it is determined that the services will continue, or hopefully, the child will be returned, create an “Updated Case Plan.” This will help in determining the recommendations and findings in the Court Report.

To create an “Updated Case Plan,” close the SDM application. With the CWS/CMS application open, be sure to open the appropriate “Case” in which to create the “Updated Case Plan.” Be sure to be in the “Case Management” section.

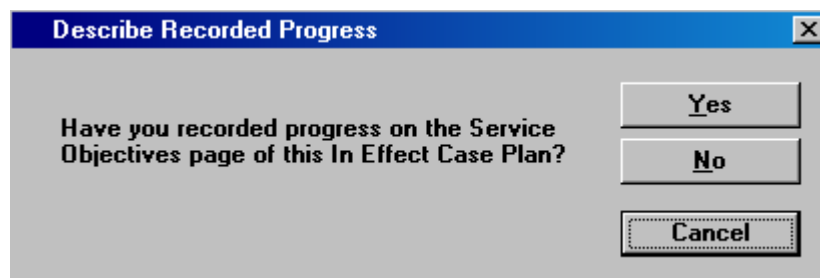
In the “Case Management” section, determine if it is possible to create an “Updated Case Plan.” The application will not allow an “Updated Case Plan” until there is an initial approved Case Plan. If a case plan has been started, until it is approved, it will be “In Progress.” Once approved, the Case Plan will be “In Effect.” When an “In Effect” Case Plan is approved, the “+” under the “Existing Case Plan” icon becomes enabled (dark). The dark + is the visual signal that an “Initial” or “Updated Case Plan” can be created.

Following the example in the rest of the chapters, the case plan for this child and family has been approved. The “Out-of-Home Reassessment” has been completed and recommended continuing services. Create the “Updated Case Plan.”



Begin by clicking the “+” under the “Open Existing Case Plan” icon.

This will result in the following dialogue box.



If progress has already been recorded, click on the “Yes” button. In this example, the progress has not been recorded which would be the guide to click on the “No” button.

Clicking on the “No” button will lead to the “Service Objectives” page of the “In Effect” Case Plan. The page has changed from when it was created. Several new information boxes have been added to the page.

ID	CP Participants	Contributing Factors	Strengths	Service Objectives	Planned Client Services	Case Mgmt Svcs
Service Objectives						
	Participant	Service Objective Type	Projected Completion Date			
1	Training, Child(8)	Comply with visitation	04/29/2010			
2	Training, Child(8)	Comply with court orders	04/29/2010			
3	Training, Father(40)	Do not physically abuse your child(ren).	04/29/2010			
4	Training, Father(40)	Protect child from physical abuse	04/29/2010			

Met (for Case Plan Update)
☐ Yes ☒ Not Determinable
☐ No ☐ In Progress

Projected Completion Date
☐ Check to select all participants
Date

Additional Description for Participant

Service Objective

Service Objective Detail

Progress (for Case Plan Update)

All Service Objectives
Met/Progress recorded.
Continue with Update

The “Met (for Case Plan Update)” and “Progress (for Case Plan Update)” are the new information boxes. A new button, “Ok – Go to Update” has also been added to the page.

	Participant	
1	Training, Child(8)	Com
2	Training, Child(8)	Com
3	Training, Father(40)	Do n
4	Training, Father(40)	Prote

Met (for Case Plan Update)

☐ Yes ☒ Not Determinable

☐ No ☐ In Progress

For each service objective line, select the appropriate radial button to record if the objective was met. The default setting is “Not Determinable.” After six months, it is likely that it will be determined and one of the other options will be selected. If wishing to record what progress was made on a case plan objective, use the “Progress (for Case Plan Update)” narrative box. There is room for 8,000 characters in this narrative box.

When the progress or lack of progress has been recorded for each of the service objectives, click the “OK – Go to Update” button.

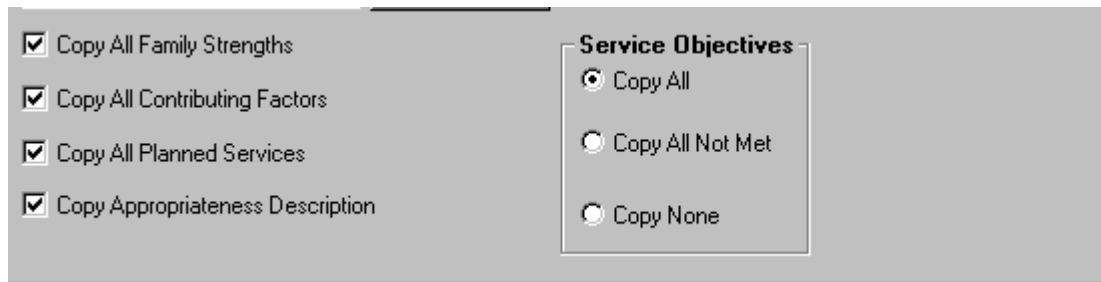


A new dialogue box, “Select Case Plan Update Participants” will appear. This is essentially the same dialogue box as when creating the initial case plan but with some new options.

Select Case Plan Update Participants [X]

All Related Clients Training, Sibling (7) Training, Father (40) Training, Mother (39)	Add Remove Case Plan Update Start Date [Yellow Box] Case Plan Update End Date [Yellow Box] Add Remove	Updated Plan Focus Children Training, Child (8)	OK Cancel Help
<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		Updated Plan Other Participants 	Service Objectives <input checked="" type="radio"/> Copy All <input type="radio"/> Copy All Not Met <input type="radio"/> Copy None

The new elements are at the bottom of the dialogue box.



☒ Copy All Family Strengths

☒ Copy All Contributing Factors

☒ Copy All Planned Services

☒ Copy Appropriateness Description

Service Objectives

☒ Copy All

☐ Copy All Not Met

☐ Copy None

Decide if it is desirable to copy Family Strengths, Contributing Factors or Planned Services from the old case plan to the new one. In an updated case plan where the objectives were not met, it is probably a good idea to copy all of each of them. The “Appropriateness Description” is a new element not part of the “Initial” case plan. Usually, it is copied from a previous case plan.

Also, decide whether to copy all of the service objectives, only the ones not met or just start over on objectives. If the family met some of the objectives, some families will not want to see those objectives again. Other families will want them on the document for proof that they completed them.

If the goal of the case plan has changed, probably the objectives have also changed. An example of this is when family reunification is ended either with the child going home or moving into some kind of long-term out-of-home situation. The objectives of such a case plan would be different from the objectives of a Family Reunification (FR) case plan. Either begins on the bottom of the dialogue box with the options just discussed or on the top of the dialogue box deciding who is going to be in the case plan. Also, enter a “Start Date.” The application will determine an “End Date” six months from the “Start Date.” The “End Date” may be shortened if needed but may never be more than six months at the “Start Date.” One time to shorten the case plan is the period between the Hearing ending reunification and the 366.26 hearing. That time period is typically 120 days.

On an updated case plan, it is possible to create a case plan not adding one of the children who was in the first case plan. This is called splitting the case plan. A warning in the application will appear saying that “Splitting the Case Plan” is about to occur. If meaning to do so, click the “OK” button, if not, click the “Cancel” button and add the missing child.

Select Case Plan Update Participants

All Related Clients
Training, Sibling (7)

Updated Plan Focus Children
Training, Child (8)

Case Plan Update Start Date
02/18/2010

Case Plan Update End Date
08/19/2010

Updated Plan Other Participants
Training, Father (40)
Training, Mother (39)

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

Service Objectives
☒ Copy All
☐ Copy All Not Met
☐ Copy None

OK
Cancel
Help

When case plan participants have been selected, the new “Start Date” and “End Date” have been entered and the options on the bottom of the screen have been determined, click the “OK” button in the top right of the dialogue box. The application will display the ID page of the “In Progress” Case Plan. Enter an “Appropriateness Description” at this point. The field is a **mandatory** field.

Case Plan Update Appropriateness Description

Remarks relevant to appropriateness of case plan's goals. This field can be updated as the case plan or its goals are modified. You can enter up to 160 characters

Notice that the field cut the narrative entry off when it reached the limit. The last word should have read "characters."

Next, remember to go the "CP Participants" page. The application will not automatically go to that page. It is still **mandatory** to select a "Case Plan Goal" for each child client in the case plan. This is done in exactly the same manner as for the "Initial" case plan. If "Return Home" is the goal, a concurrent goal must also be selected. Pick the most permanent concurrent goal possible in the situation.

Client Services - Case [Training, Child] - [Case Plan [In Progress]]

File Edit Search Action Associated Attach/Detach Window Help Toolz

Case Plan Participants

	Participant	Case Plan Goal	Goal Projected Completion Date
1	Training, Child (8)	Return Home	08/19/2010
2	Training, Father (40)		
3	Training, Mother (39)		

Case Plan Goal: **Return Home**

Goal Projected Completion Date: **08/19/2010**

Assessed by Adoptions:

- ☒ Adoptable
- ☐ Not Adoptable
- ☐ Not Assessed

Current Service Component:

Service Component Type: **Emergency Response**

Effective Date: **09/30/2009**

Permanency Alternative/Concurrent Planning: **Adoption**

Projected CWS Termination Date: **09/30/2010**

Ready Case [Training, Child] -> Case Plan [In Progress]

The “Contributing Factors” page and the “Family Strengths” page are not likely to have changed from the initial case plan if a complete assessment was done prior to the initial case plan. One exception might be if a subsequent petition was filed and the

Court found new allegations true. Frequently, these pages need no new attention. It is, however, a good idea to review the pages and confirm the accuracy of the information.

When creating the “Updated” case plan in this example, it was decided to copy the existing service objectives. The application made an exact copy of the service objectives in the initial case plan and inserted them into the updated case plan, only changing dates. Any descriptions will also be carried forward to the new case plan.

Service Objectives

+	Participant	Service Objective Type	Projected Completion Date
1	Child(8)	Comply with court orders	08/19/2010
2	Child(8)	Comply with visitation	08/19/2010
3	Father(40), Mother(39)	Do not physically abuse your child(ren).	08/19/2010
4	Father(40)	Other Service Objective	08/19/2010

Participants

+	Participants
1	Training, Child(8)

Projected Completion Date

☐ Check to select all participants

Date **08/19/2010**

Service Objective

Comply with court orders

Service Objective Detail

You will comply with all orders of the court.

Go to View by Participant

Additional Description for Participant

ID	CP Participants	Contributing Factors	Strengths	Service Objectives	Planned Client Services	Case Mgmt Svcs
Planned Client Services						
+	Participant	Category	Service Type	Wraparound		
1	Child(8)	Counseling/Mental Health	General Counseling	Yes		
2	Father(40), Mother(39)	Counseling/Mental Health	General Counseling	Yes		
3	Father(40), Mother(39)	Education Services	Parenting Education Program	Yes		
4	Father(40), Mother(39)	Substance Abuse Services	Substance Abuse (inpatient)	Yes		

+
Participants

1	Training, Father(40)
2	Training, Mother(39)

Service

Category
Substance Abuse Services

Type
Substance Abuse (inpatient)

☒ Wraparound

Schedule for Service

Start Date
02/18/2010

End Date
08/19/2010

Occurrences
1

Frequency
Weekly

Go to View by Participant

Description/Responsibilities for Service

The parents are to attend and cooperate with the Substance Abuse Treatment center intake therapist. They will follow all recommendations of the intake therapist to include inpatient treatment if so ordered. The parents will attend all scheduled sessions, missing only for good cause, with prior notice to the

Provider

☐ Staff Person
☒ Service Provider
☐ Collateral

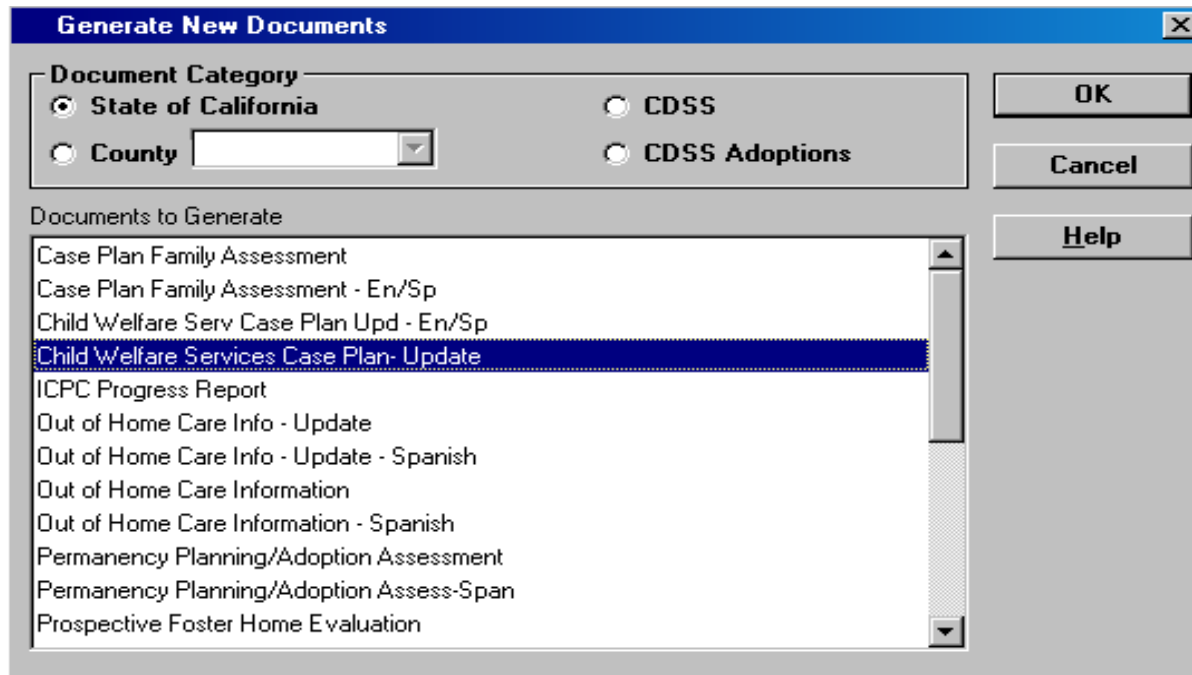
Provider Name
Bruner DO, Sally - Valley Children's

The same is true for the “Planned Client Services.” It is not common to add new services when continuing previous services unless there has been a subsequent petition found true. In a number of legal jurisdictions with no new allegations, the attorneys would argue against allowing the new elements.

Finally, the “Case Management Services” from the Initial Case Plan would also carry forward. Any descriptions would also carry forward. Additionally, there are no restrictions to adding additional services on this page. If it will help the child or family toward completing the stated goal, add the service.

That completes all pages for the “Updated Case Plan.” When continuing with the same case plan goal as the preceding case plan, there is only minimal entry required. More entry will be necessary if the goal has changed as the objectives and services will change to accommodate the new goal.

Updated Case Plan Document



Next, create the "Updated Case Plan Document." Click on the "+" under the "Open Existing Document - Case



Plan" icon. That will open a "Generate New Documents" dialogue box that will have the same options as when the initial case plan document was created. The difference will be that the two case plan documents have changed to "Child Welfare Serv Case Plan Upd – Eng/Sp" and "Child Welfare Services Case Plan – Update."

Select the "Child Welfare Services Case Plan – Update" by clicking on it.

Then, click the "OK" button in the top right of the dialogue box. The application will ask for which "Case Plan" as when creating the initial case plan. Select the correct case plan and click "OK." Next, the application will show how many objectives, services etc. were selected and what documents have already been created related to this case plan. Say "OK."

There will be one last dialogue box. This one will ask if the “Family Assessment Update” should be included. There are no county policies in the North state around this, so there is freedom to decide. The “Family Assessment Update” has three headings:


FAMILY ASSESSMENT UPDATE

Significant Changes:

Current Condition Of Children And Family:

Family's Perception Of Their Needs:

If choosing not to include the update in the case plan, these three headings are also elements of any status review report.

After the “Updated Case Plan Document” has been created, it is time to send the case plan for approval. This is done as it was with the initial case plan. Go to the “Action” drop down menu at the top of the screen.  After clicking on “Action,” select “Approval” from the list of options.

If “Approval” is grayed out, there are only two things that can be causing it. Either the “Updated Case Plan” document was not created or there is a **mandatory** field that has not been completed. The field may not be in the same case as the case plan if other cases were opened prior to working on the case plan and the current plan was not saved to database prior to beginning the updated case plan.

Attempting to save to database will always cause the application to return to any uncompleted **mandatory** fields. After completing the fields, go back to the case plan and see if approval is now available. If not, save to database again. Repeat as necessary to enable the “Approval” function.

Saving one too many times will cause the application to go back to the control panel or the blank screen with only the referral and case folders. To correct, simply open the case with the updated case plan, open the updated case plan, and then send it for approval.

The “Individual Client Responsibilities” report is also available for updated case plans. It is created in exactly the same way as for the initial case plan. Go to “File,” “Create Report,” select “Case Plan Reports” as the area of interest, then select the “Individual Client Responsibilities” as the report, and click on “Print Preview.” Next, select which client and say “OK.”

If the child is receiving TILP services, then a new TILP case plan will need to be created in exactly the same manner as the original. Create the TILP from the drop down menu under the “Create New Case Plan Document.” Click the “+” under the Case Plan Document icon to get the drop down menu. Select which child this TILP is for. Only select one child at a time.

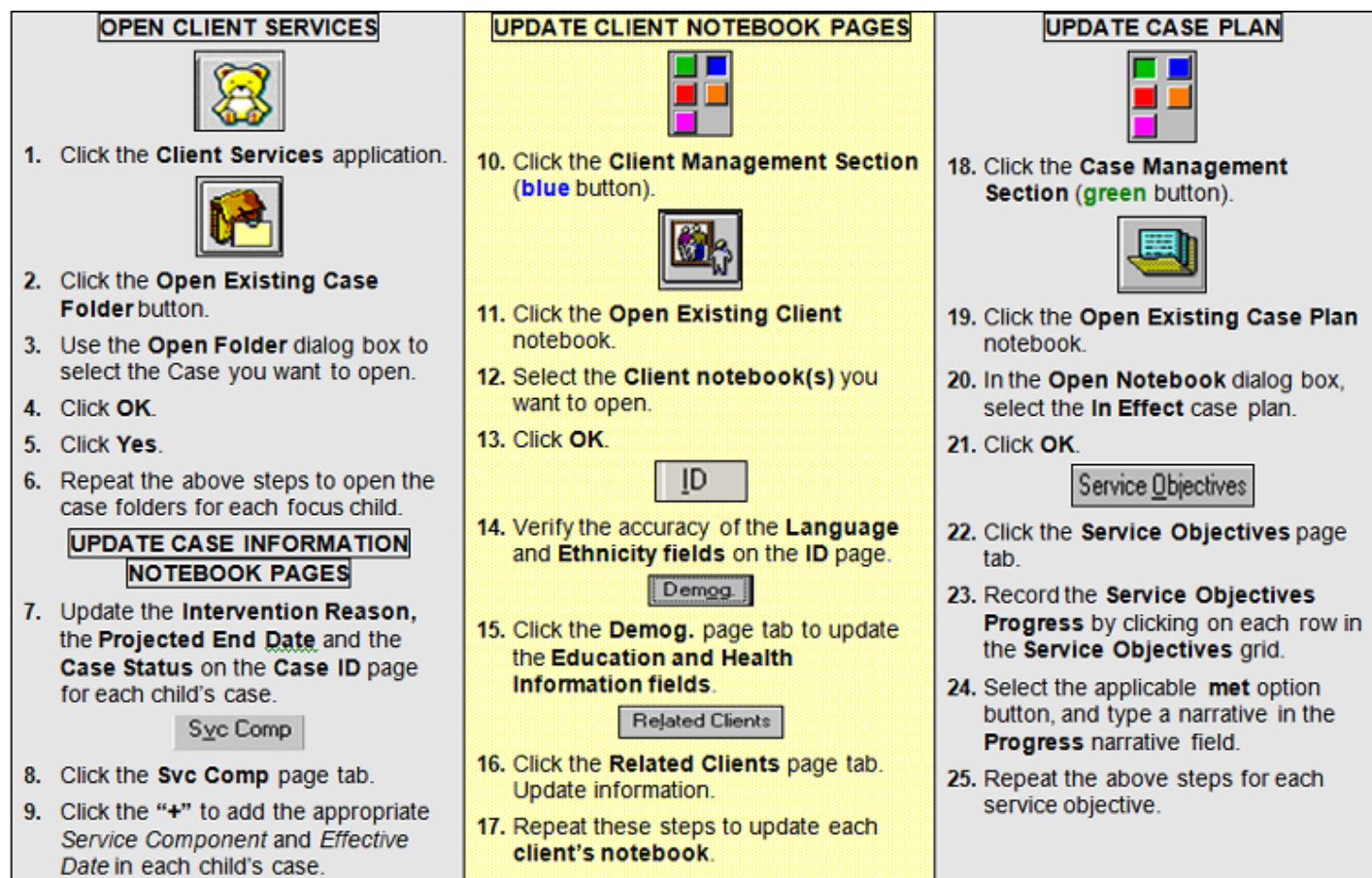
Activities


Go to activity handout, chapter 12.


Process Maps/ Cheat Sheets

Updated Case Plan Process Map

(Page 1 of 3)



<div data-bbox="445 284 709 381"><div>OK - Go to Update</div><div>All Service Objectives Met/Progress recorded. Continue with Update</div></div> <p>26. Click the OK-Go to Update button.</p> <p>27. Select the child(ren) for whom this case plan is being created.</p> <p>28. Click the top Add button.</p> <p>29. Select the adults who will participate in this case plan.</p> <p>30. Click the bottom Add button.</p> <p>31. Enter the effective date in the Case Plan Update Start Date box.</p> <div data-bbox="483 727 672 803"><div>Service Objectives</div><div>Copy All</div></div> <p>32. Click on Copy All Checkboxes and Service Objectives.</p> <p>33. Click OK.</p> <div data-bbox="399 928 756 1006"><div>Case Plan Update Appropriateness Description</div><div>Parents continue receiving counseling services. Children are doing well in foster care. Pending</div></div> <p>34. On the ID page enter the reason for the update in the Case Plan Update Appropriateness Description text box.</p>	<div data-bbox="955 284 1144 316">CP Participants</div> <p>35. Click the CP Participants page tab.</p> <p>36. Click the Case Plan Goal drop-down list.</p> <p>37. Enter a Case Plan goal for each child in the Case Plan Participants grid.</p> <p>38. Update all fields on the page.</p> <div data-bbox="961 555 1138 597">Contributing Factors</div> <p>39. Click the Contributing Factors page tab.</p> <p>40. Complete all mandatory (yellow) and known fields.</p> <div data-bbox="991 750 1108 799">Strengths</div> <p>41. Click the Strengths page tab.</p> <p>42. Update and complete all mandatory (yellow) and known fields.</p> <div data-bbox="970 922 1129 961">Service Objectives</div> <p>43. Click the Service Objectives page tab.</p> <p>44. Update and complete all mandatory (yellow) and known fields.</p>	<div data-bbox="1411 284 1642 328">Planned Client Services</div> <p>45. Click the Planned Client Services page tab.</p> <p>46. Click the “+” in the Planned Client Services grid.</p> <p>47. Update and complete all mandatory (yellow) and known fields.</p> <div data-bbox="1432 555 1617 597">Case Mgmt Svcs</div> <p>48. Click the Case Mgmt Svcs page tab.</p> <p>49. Click the “+” in the Case Management Services grid.</p> <p>50. Update and complete all mandatory (yellow) and known fields.</p> <div data-bbox="1327 787 1717 815">CREATE CASE PLAN DOCUMENT</div> <div data-bbox="1474 831 1564 971"></div> <p>51. Click the “+” to Create New Document - Case Plan.</p> <p>52. Click the CWS Case Plan Update.</p>
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<p>53. Click OK.</p> <p>54. Click the In Progress Case Plan.</p> <p>55. Click OK.</p> <p>56. Click OK in the Generate Case Plan Document dialog box.</p> <p>57. Click No in the Case Plan Update dialog box.</p> <p>58. Review the document for accuracy.</p> <p>59. Click the File drop-down menu.</p> <p>60. Select Print.</p> <p>61. Save, close and minimize MS Word.</p> <p>62. Click the ID page.</p> <p>RECORD PARTICIPANT REVIEW</p>  <p>Complete all applicable fields in the Participant Review grid.</p>	<p>63. Enter the date the staff person reviewed the case plan with the participant(s).</p> <p>64. Enter the date the participant(s) signed the case plan.</p> <p>65. If the participant(s) did not sign the case plan, enter the date and reason in the Reason Not Signed/Comments narrative field.</p> <p>REQUEST APPROVAL</p> <p>Action</p> <p>66. Click the Action drop-down menu</p> <p>67. Select Approval in the drop-down list.</p> <p>68. Click the drop-down list in the Approval Status field in the Approval Detail (Case Plan) dialog box.</p> <p>69. Click Pending/Approval.</p> <p>70. Click OK.</p> <p>SAVE TO DATABASE</p> <p>File</p>	<p>71. Click the File drop-down menu.</p> <p>72. Select Save to Database.</p> <p>73. Click Exit CWS/CMS.</p> <p>Created by the CWS/CMS Project Office</p>
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CHILD WELFARE SERVICES CASE PLAN UPDATE - [COURT]

CASE PLAN PARTICIPANTS

PARENTS/GUARDIAN

<u>Name</u>	<u>Date Of Birth</u>	<u>Relationship</u>	<u>To</u>
(CP Participants page of Case Plan notebook, participants that are related in Client notebook as parents to focus children)	12/22/1957	Spouse	
		Mother (Birth)	
		Mother (Birth)	
		Mother (Birth)	
	08/16/1954 (Client NB of parent, ID page)	Spouse	(Client NB, related clients page)
		Father	
		(Alleged)	
		Father (Birth)	
		Father (Birth)	
		(Client NB, related clients page)	

CHILD(REN)

<u>Name</u>	<u>Date Of Birth</u>	<u>Age</u>	<u>Sex</u>	<u>Court Number</u>
(CP Participants page, Case Plan NB, focus children)	06/03/1985	16 y	F	987234A
	09/09/1990	10 y	M	987343A
	10/06/1994	6 y	F	jv345322
	(Client NB, ID page for DOB, Age and Sex)			(Client NB of focus child, Juv.Ct # page)

<u>Name</u>	<u>Case Plan Goal</u>	<u>Projected Completion Date</u>	<u>Projected Date For Termination Of Child Welfare Services</u>
	Return Home	06/26/2002	07/25/2003
	Return Home	06/26/2002	08/14/2003
	Return Home	06/26/2002	08/16/2007
	(CP Participants page of Case Plan NB)	(CP Participants page of Case Plan NB)	(ID page of Case Info NB, Projected End Date Field)

Adequacy And Continued Appropriateness Of The Case Plan:

(ID page of the Case Plan notebook, Appropriateness Description text box)

The goal to return children home is unchanged.

FAMILY ASSESSMENT UPDATE

Significant Changes:

(User supplied narrative)

Current Condition Of Child(ren) And Family:

(User supplied narrative)

Family's Perception Of Their Needs:

(User supplied narrative)

CASE PLAN SERVICE OBJECTIVES AND CLIENT RESPONSIBILITIES

SERVICE OBJECTIVE

1. Cooperate with services to achieve legal permanency.

<u>Previous Service Objective</u>	<u>Projected Completion Date</u>	<u>Objective Met</u>
Yes (system supplied)	06/26/2002 (Service Objectives page of current in progress case plan)	Not Determinable (Service Objectives page of Previous Case Plan, Met/Not Met option buttons)
<u>Description</u> Claudia is to cooperate with the alternative plan for permanency for the children. (Service Objectives page of Case Plan NB, Description field)		
<u>Progress</u> (Service Objectives page of Previous Case Plan, Progress field)		

2. Stay free from illegal drugs and show your ability to live free from drug dependency. Comply with all required drug tests.

<u>Previous Service Objective</u>	<u>Projected Completion Date</u>	<u>Objective Met</u>
Yes (system supplied)	06/26/2002 (Service Objectives page of current in progress case plan)	In Progress (Service Objectives page of Previous Case Plan, Met/Not Met option buttons)
<u>Description</u> (Service Objectives page of Case Plan NB, Description field)		
<u>Progress</u> (Service Objectives page of Previous Case Plan, Progress field)		

CLIENT RESPONSIBILITIES

(The following activities populate from the Planned Client Svcs page of the Case Plan NB. All frequency and date information come from the Schedule for Service section)

<u>Activity</u>	<u>Times</u>	<u>Frequency</u>	<u>Completion Date</u>
1. Substance Abuse Services	Substance Abuse (outpatient)	5	Weekly
2. Substance Abuse Services	Substance Abuse Testing	1	Weekly
<u>Description</u> Random drug testing (Case Plan NB, Planned Client Svcs page, Description text box)			
3. Substance Abuse Services	12-Step Program	5	Weekly

SERVICE OBJECTIVES

1. Cooperate with services to achieve legal permanency.

<u>Previous Service Objective</u>	<u>Projected Completion Date</u>	<u>Objective Met</u>
Yes (system supplied)	06/26/2002 (Service Objectives page of current in progress case plan)	Not Determinable (Service Objectives page of Previous Case Plan, Met/Not Met option buttons)

Description

Leonard is to cooperate with the alternative plan for permanency for the children.

(Service Objectives page of Case Plan NB, Description field)

Progress

(Service Objectives page of Previous Case Plan, Progress field)

2. Stay free from illegal drugs and show your ability to live free from drug dependency. Comply with all required drug tests.

<u>Previous Service Objective</u>	<u>Projected Completion Date</u>	<u>Objective Met</u>
Yes (system supplied)	06/26/2002 (Service Objectives page of current in progress case plan)	In Progress (Service Objectives page of Previous Case Plan, Met/Not Met option buttons)

Description

(Service Objectives page of Case Plan NB, Description field)

Progress

(Service Objectives page of Previous Case Plan, Progress text box)

CLIENT RESPONSIBILITIES

(The following populates from the Planned Client Svcs page of the Case Plan NB. All frequency and date information come from the Schedule for Service section)

<u>Activity</u>	<u>Times</u>	<u>Frequency</u>	<u>Completion Date</u>
1. Substance Abuse Services	Substance Abuse (outpatient)	5	Weekly
2. Substance Abuse Services	Substance Abuse Testing	1	Weekly
<u>Description</u> Random drug testing (Case Plan NB, Planned Client Svcs page, Description field)			
3. Substance Abuse Services	12-Step Program	5	Weekly

SERVICE OBJECTIVES

1. Learn to develop/balance a budget and learn to shop within your means.

<u>Previous Service Objective</u>	<u>Projected Completion Date</u>	<u>Objective Met</u>
Yes (system supplied)	06/26/2002 (Service Objectives page of current in progress case plan)	Yes (Service Objectives page of Previous Case Plan, Met/Not Met option buttons)

Progress

(Service Objectives page of Previous Case Plan, Progress text box)

2. Complete class and homework assignments.

<u>Previous Service Objective</u>	<u>Projected Completion Date</u>	<u>Objective Met</u>
Yes (system supplied)	06/26/2002 (Service Objectives page of current in progress case plan)	Yes (Service Objectives page of Previous Case Plan, Met/Not Met option buttons)

Progress

(Service Objectives page of Previous Case Plan, Progress text box)

CLIENT RESPONSIBILITIES

(The following activities populate from the Planned Client Svcs page of the Case Plan NB. All frequency and date information comes from the Schedule for Service section)

<u>Activity</u>	<u>Times</u>	<u>Frequency</u>	<u>Completion Date</u>
1. Counseling/Mental Health Services Sexual Abuse	2	Weekly	06/26/2002

Antonio Wainwright

SERVICE OBJECTIVES

1. Receive age appropriate, child oriented services.

<u>Previous Service Objective</u>	<u>Projected Completion Date</u>	<u>Objective Met</u>
Yes (system supplied)	06/26/2002 (Service Objectives page of current in progress case plan)	Yes (Service Objectives page of Previous Case Plan, Met/Not Met option buttons)
<u>Progress</u> (Service Objectives page of Previous Case Plan, Progress text box)		

CLIENT RESPONSIBILITIES

(The following activities populate from the Planned Client Svcs page of the Case Plan NB. All frequency and date information comes from the Schedule for Service section)

<u>Activity</u>	<u>Times</u>	<u>Frequency</u>	<u>Completion Date</u>
1. Counseling/Mental Health Services Sexual Abuse	2	Weekly	06/26/2002

Julie Wainwright

SERVICE OBJECTIVES

1. Attend school regularly. Any absences are to be excused. Only excused absences are acceptable.

<u>Previous Service Objective</u>	<u>Projected Completion Date</u>	<u>Objective Met</u>
Yes (system supplied)	06/26/2002 (Service Objectives page of current in progress case plan)	Not Determinable (Service Objectives page of Previous Case Plan, Met/Not Met option buttons)
<u>Progress</u> (Service Objectives page of Previous Case Plan, Progress text box)		

VISITATION SCHEDULE

(These populate from the Case Mgmt Svcs page of the Case Plan NB. Be sure to fill in the necessary mandatory fields in the left hand corner of the page for proper visitation schedules to appear)

CHILD(REN) - PARENT(S)/GUARDIAN(S) VISITATION

(Must select Case Mgmt Svcs, Arrange Visitation and complete the 'Child/Parent-Guardian' for type of visit)

CHILD(REN) – SIBLING(S) VISITATION

(Must select Case Mgmt Svcs, Arrange Visitation and complete the 'Child/Sibling' for type of visit)

CHILD(REN) – GRANDPARENT(S) VISITATION

(Must select Case Mgmt Svcs, Arrange Visitation and complete the 'Child/Grandparent' for type of visit)

AGENCY RESPONSIBILITIES

(These populate from the Case Mgmt Services page of the Case Plan NB. All Schedule for Service information must be filled in the notebook page in order for them to appear here)

(In order for this section to appear, there must be a Family Reunification service component for each focus child included here, AND the Alternative/Concurrent Planning Goal field on the CP Participants page of the Case Plan NB must be completed.)

Permanency Alternative / Concurrent Planning Goal

For Whom

Concurrent Planning Goal

Adoption

Adoption

Self-Maintenance

(CP Participants page of Case Plan NB, Alternative, Concurrent Planning Goal field)

CONTACT SCHEDULE

(These contacts populate from the Case Mgmt Svcs page of the Case Plan NB. For each type of contact listed here, it is important to complete all fields in the Case Plan NB. For this to populate with the proper times, frequency and dates, the schedule for service fields must be entered.)

SOCIAL WORKER – CHILD CONTACTS

<u>Method</u>	<u>Times</u>	<u>Frequency</u>	<u>Beginning Date</u>
In-Person	1	Monthly	12/26/2001

SOCIAL WORKER – PARENT(S)/GUARDIAN(S) CONTACTS

<u>Method</u>	<u>Times</u>	<u>Frequency</u>	<u>Beginning Date</u>
In-Person	1	Monthly	12/26/2001

SOCIAL WORKER – CARE PROVIDER CONTACTS

(Note: The 'staff person/subcare provider' contact type must be entered in order for this information to populate into the document. When entering this contact type, first enter a participant and then remove the participant when selecting the contact type of staff person/subcare provider. It is appropriate to enter this contact type without a name.)

<u>Method</u>	<u>Times</u>	<u>Frequency</u>	<u>Beginning Date</u>
In-Person	1	Monthly	12/26/2001

Description

Social worker to meet with Joy Ayers

(Case Plan NB, Case Mgmt Svcs page, Description text box)

ACKNOWLEDGMENT OF PARENT(S)/GUARDIAN(S)

IN SIGNING THIS CASE PLAN, I ACKNOWLEDGE THAT I . . .

- Participated in the case plan development.
- Agree to participate in the services outlined in this case plan.
- Received a copy of this case plan.

(The following 2 bullets will populate into the Case Plan document only when a Concurrent Planning Service (e.g. Assess child for adoptions) has been selected on the Case Mgmt Svcs page of the Case Plan NB).

- Understand that while I am receiving services to reunify with my child(ren), efforts will also be made to locate an alternate permanent home through Adoption, Guardianship or Long Term Foster Care for my child(ren) should reunification services fail.
- Understand that my failure to cooperate or to take advantage of the services provided in this case plan may result in termination of efforts to reunify with my children.

SIGNATURE OF MOTHER/GUARDIAN

DATE

SIGNATURE OF FATHER/GUARDIAN

DATE

SIGNATURE OF OTHER

DATE

SIGNATURE OF OTHER

DATE

NON-SIGNATURE EXPLANATION