CWS/CMS
(Assessment and Case Plan)

Create an Initial Case Plan

Process Map

OPEN CLIENT SERVICES

1. Click the **Client Services** application.

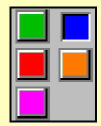
2. Click the **Open Existing Case Folder** button.
3. Use the **Open Folder** dialog box to select the **Case** you want to open.
4. Click **OK**.
5. Repeat the above steps to open the case folders for each focus child.

UPDATE CASE INFORMATION NOTEBOOK PAGES

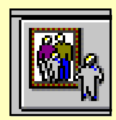
6. Review and edit the **Intervention Reason,** the **CWS Projected End Date** and the **Case Status** on the **Case ID** page for each child's case.

7. Click the **Svc Comp** page tab.
8. Click the **"+"** to add the appropriate Service Component and Effective Date in each child's case.

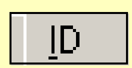
UPDATE CLIENT NOTEBOOK PAGES



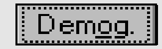
9. Click the **Client Management Section** (**blue** button).



10. Click the **Open Existing Client** notebook.
11. Select the **Client notebook(s)** you want to open.
12. Click **OK**.

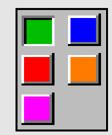


13. Complete the Language and Ethnicity fields on the **ID** page tab (cannot be blank).



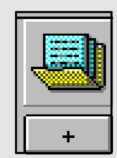
14. Click the **Demog.** page to update the **Education and Health Information fields** (cannot be blank).

15. Click the **Related Clients** page tab.
16. Update information.
17. Repeat these steps to update each **client's** notebook.



18. Click the **Case Management Section** (**green** button).

CREATE CASE PLAN



19. Click the **"+" Create a New Case Plan**.
20. Select the **child(ren)** for whom this case plan is being created.

21. Click the top **Add** button.

22. Select the **adults** who will participate in this case plan.

23. Click the bottom **Add** button.

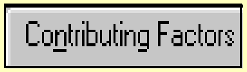
24. Enter the **effective date** in the **Case Plan Start Date box.**

25. Click **OK.**

26. Click the **participant** in the **Case Plan Participant** grid.

27. Click the **Case Plan Goal** drop-down list and enter a **Case Plan goal** for each child.

28. Complete all mandatory (yellow) and known **fields**.



29. Click the **Contributing Factors** page tab.

30. Click the **"+"** in the **Contributing Factors** grid.

31. Complete all mandatory (yellow) and known **fields**.

32. Click the **Strengths** page tab.

33. Click the **"+"** in the **Strengths** grid.

34. Complete all mandatory (yellow) and known **fields**.

35. Click the **Service Objectives** page tab.

36. Click the **"+"** in the **Service Objectives** grid.

37. Complete all mandatory (yellow) and known **fields**.

38. Click the **Planned Client Services** page.

39. Click the **"+"** in the **Planned Client Services** grid.

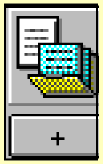
40. Complete all mandatory (yellow) and known **fields**.

41. Click the **Case Mgmt Svcs** page.

42. Click the **"+"** in the **Case Mgmt Svcs** grid.

43. Complete all mandatory (yellow) and known **fields**.

CREATE CASE PLAN DOCUMENTS



44. Click the **"+"** to create a **New Case Plan Document**.

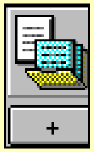
45. Select **Case Plan Family Assessment**.

46. Click **OK**.

47. Click the **In Progress Case Plan**.

48. Click **OK**.

49. **Save, close** and **minimize MS Word**.



50. Click the **"+"** to create a **New Case Plan Document**.

51. Click the **CWS Case Plan**.

52. Click **OK**.

53. Click the **In Progress** case plan.

54. Click **OK**.

55. Click **OK** in the **Generate Case Plan Document** dialog box.

56. Review the document for accuracy.

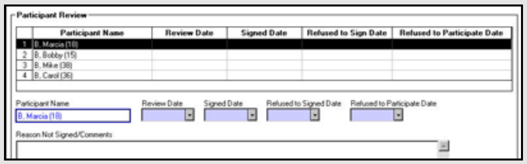
57. Click the **File** drop-down menu.

58. Select **Print**.

59. **Save, close** and **minimize MS Word**.

60. Click the **ID** page.

RECORD PARTICIPANT REVIEW



Complete all applicable fields in the Participant Review grid

61. Enter the **date** the staff person reviewed the case plan with the participant(s)**.**

62. Enter the **date** the participant(s) signed the case plan.

63. If the participant(s) did not sign the case plan, enter the date and reason in the **Reason Not Signed/Comments** narrative field.

REQUEST APPROVAL

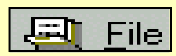
64. Click the **Action** drop-down menu.

65. Select **Approval**.

66. Click **Pending Approval**.

67. Click **OK**.

SAVE TO DATABASE



68. Click the **File** drop-down menu.

69. Select **Save to Database**.

70. Click **Continue Working**.

Continue working will automatically load the next arc file M03_S03 Assessment and Case Plan – Update.arc