CWS/CMS Quick Guide for Case Planning

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Central CA Training Academy
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CWS/CMS Case Plan

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CASE PLAN – DIVISION 31 REQUIREMENTS (31-200)

1. Complete an assessment (31-201.11)
   Family Assessment document that meets all 31 requirements can be generated in CWS/CMS.

2. Determine a case plan goal (31-201.12)

3. Determine the date child welfare services will be terminated. (31-206.23)
   Document on the ID page of the Case.

4. Develop the concurrent case planning goal (if an FR case) (31-201.121(b)(2)

5. Develop the measurable, time limited objectives to be achieved (31-206.21)
   The objectives should be based on the problems and family strengths.

6. Identify the services to be provided (31-206.22)

7. Identify case management activities to be performed (31-206.22)

8. Identify the schedule of planned social worker contacts (31-206.24)
   a. social worker / child
   b. social worker / parent
   c. social worker / care provider
   (1) Social worker will document the justification for any exceptions to contact/visit requirements (31.260.24.241)
   Document exceptions on the Case Mgt Svcs page of the Case Plan – that will insure they won't be included in monthly contact statistics pulled for outcome measures.

9. Identify the schedule of planned visit's with the child and family (31-206.24)
   a. child / parent
   b. child / sibling
   c. child / grandparent

10. Assessment of child's placement needs and placement rationale (31-206.31)

11. Health and education information about the child (31.206.35)
    All required information can be documented in the health and education notebooks.

12. Document the CHDP medical and dental plan. (31.206.36)

13. Incorporate the transitional independent living plan for each child in placement 16 and older. (31-206.37)

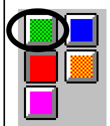
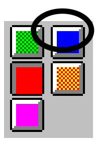
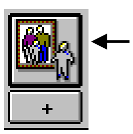
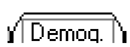
14. If a dependency petition has been filed, document your recommendation that right of parent/guardian to make education decisions be limited by the court, if applicable. (31-206.38)
    This can be recorded in the child's client notebook or education notebook.

CASE PLAN UPDATE

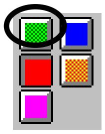
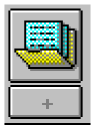
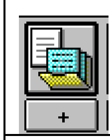
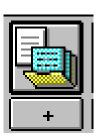
1. A case plan update should be completed as often as service needs of the child and family dictate but a minimum in conjunction with each status review hearing but no less often than once very 6 months. (31-230.11)

2. Case Plan documentation must reflect: (31-225)
   a. Any changes in the information contained in the case plan.
   b. Specific information about the current condition of the child/family.
   c. Degree of parental compliance.
   d. Cooperation in keeping appointments.
   e. Visiting patterns of parents when children are in out of home care.
   f. Case plan adequacy and continued appropriateness.

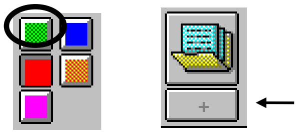
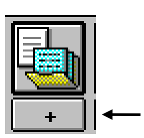
Things to Check before Beginning the Case Plan

CASE INFO  **Each Focus Child's case must be opened and these pages must be checked.**	 ✓ Case Name Correct. ✓ Projected End Date of Child Welfare Services entered. ✓ Intervention Reasons entered. ✓ Case Status – Court or Voluntary with correct effective date.  ✓ Correct Service Component and Date entered.
CLIENT INFO   **Check these pages for each client that will be a Case Plan Participant.**	 ✓ Gender, DOB, Age, SSN entered. ✓ ICWA eligibility checked if applicable. ✓ Primary and Secondary languages identified. ✓ Primary and Secondary Ethnicity entered. ✓ Fill in PERIWINKLE fields if known. ✓  ✓ Complete Education Information and Health Information Boxes ✓ Fill in PERIWINKLE fields if known.  ✓ Make sure relationships are correct.  ✓ Juvenile Court number should be entered for all case focus children if case status is 'Court'. **SAVE TO DATABASE** – before beginning the Case Plan.

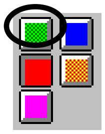
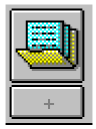
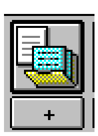
QUICK GUIDE TO CASE PLAN

Create New Case Plan  	From the 'Dialog Box' that appears when selecting a new case plan – select Focus children and other Case Plan participants. Enter the Case Plan 'Start Date' – the system will automatically enter the end date 6 months later.
ID	Complete 'appropriateness description' only if this is an Update. Record participant review/signed date on this page.
CP Participants	Record Case Plan Goal for each child here. **Be sure to enter 'Permanency Alternative/Concurrent Plan' if appropriate.**
Contributing Factors	Select contributing factors for each participant. Use the 'Apply' button to remain in the dialog box. Record detail description as needed.
Strengths	Select strengths for each participant, and record detail description as needed.
Service Objectives	At least one participant **MUST** have at least one service objective. Projected completion date is automatically entered. **Record detail description to make objectives 'SMART'.** (Specific, measurable, achievable, result focused and time limited)
Planned Client Services	From 'dialog box', select participants, category and type of services. Enter detail description as necessary.
Case Management Services **Save to Database**	SW Plan Contact for child is automatically entered. **Select any additional services using the + sign, be sure to complete all Yellow fields. Enter detail description as necessary. If SW Contact less often than monthly – complete Visitation Waiver section and verify dates.**
Create New Case Plan Documents – Case Plan Family Assessment 	The Assessment is a Word document that is filled in from the entries made in prior notebooks. SW can review and edit the document, adding narrative in areas that are not able to be populated. Save/Print/Close or Minimize Word
Create New Case Plan Documents – Case Plan Document 	The Case Plan is a Word document that is filled in from the entries made in prior notebooks. SW can review and edit the document, adding narrative in areas that cannot be automatically populated. Save/Print/Close or Minimize Word **To print 'Individual Client Responsibilities' for a participant – select from Case Plan Reports under File / Print Report.**
ACTION / APPROVAL **SAVE TO DATABASE**	Request 'pending approval' here. If approval button is greyed out – check **HELP** for approval criteria. **After Supervisor approves Case Plan, record Parental Review/Date Signed on the ID page.**

QUICK GUIDE TO UPDATING A CASE PLAN

Create New Case Plan  **NOTE: You can only do a Case Plan update when your existing case plan is 'in effect'!**	Immediately after using the + plus button to create updated Case Plan: You will need to check YES or NO regarding recording progress toward Service Objectives of the In-Effect Case Plan. Once progress is recorded: Use the "**GO TO CASE PLAN UPDATE**" box to begin. From the 'Dialog Box' that appears when selecting a new case plan – select Focus children and other Case Plan participants. Enter the Case Plan 'Start Date' – the system will automatically enter the end date 6 months later. Use the COPY feature to copy appropriate items into the update.
ID	Record 'Appropriateness Description' of this case plan update.
CP Participants	Record Case Plan Goal for each child here. **Be sure to enter 'Permanency Alternative/Concurrent Plan' if appropriate.**
Contributing Factors	Selections from previous Case Plan will be copied here. Select any additional contributing factors for each participant. Use the 'Apply' button to remain in the dialog box. Record detail description as needed.
Strengths	Selections from previous Case Plan will be copied here. Select any additional strengths for each participant, and record detail description as needed.
Service Objectives	**Selections from previous Case Plan will be copied here. Add, delete or modify objectives as appropriate. At least one participant** MUST **have at least one service objective. Projected completion date is automatically entered. Record detail description to make objectives 'SMART'.** (Specific, measurable, achievable, result focused and time limited)
Planned Client Services	Selections from previous Case Plan will be copied here. Add, delete or modify services as appropriate. From 'dialog box', select participants, category and type of services. Enter detail description as necessary.
Case Management Services **Save to Database**	Selections from previous Case Plan will be copied here. Add, delete or modify services as appropriate. Select any additional services using the + sign, be sure to complete all Yellow fields. Enter detail description as necessary.
Create New Case Plan Documents – Updated Case Plan Document 	The Case Plan Update is a Word document that is filled in from the entries made in prior notebooks. SW can review and edit the document, adding narrative in areas that cannot be automatically populated. Save/Print/Close **To print 'Individual Client Responsibilities' for a participant – select from Case Plan Reports under File / Print Report.**
ACTION / APPROVAL **SAVE TO DATABASE**	Request 'pending approval' here. If approval button is greyed out – check **HELP** for approval criteria. **After Supervisor approves Case Plan, record Parental Review/Date Signed on the ID page.**

QUICK GUIDE TO SPLITTING A CASE PLAN

Create New Case Plan   **NOTE: Use this procedure when the in-effect Case Plan includes more than one Focus Child, and the update will NOT include all of the same children. When splitting a case plan, need to have all children's cases open at the same time.**	Immediately after using the + plus button to create updated Case Plan: You will need to check YES or NO regarding recording progress toward Service Objectives of the In-Effect Case Plan. Once progress is recorded: Use the "**GO TO CASE PLAN UPDATE**" box to begin. From the 'Dialog Box' that appears when selecting a new case plan – select Focus children and other Case Plan participants. DO NOT INCLUDE the children you are splitting out – you will get "Splitting a Case Plan Warning" – just click OK. Enter the Case Plan 'Start Date' – the system will automatically enter the end date 6 months later. Use the COPY feature to copy appropriate items into the update. Items copied will only be for participants selected.
ID	Record 'Appropriateness Description' of this case plan update.
CP Participants	Record Case Plan Goal for each child here. **Be sure to enter 'Permanency Alternative/Concurrent Plan' if appropriate.**
Contributing Factors	Selections from previous Case Plan will be copied here. Select any additional contributing factors for each participant. Use the 'Apply' button to remain in the dialog box. Record detail description as needed.
Strengths	Selections from previous Case Plan will be copied here. Select any additional strengths for each participant, and record detail description as needed.
Service Objectives	**Selections from previous Case Plan will be copied here. Add, delete or modify objectives as appropriate. At least one participant** MUST **have at least one service objective. Projected completion date is automatically entered.** Record detail description to make objectives 'SMART'. **(Specific, measurable, achievable, result focused and time limited**)
Planned Client Services	**Selections from previous Case Plan will be copied here. Add, delete or modify services as appropriate. From 'dialog box', select participants, category and type of services. Enter detail description as necessary.**
Case Management Services **Save to Database**	**Selections from previous Case Plan will be copied here. Add, delete or modify services as appropriate. Select any additional services using the + sign, be sure to complete all Yellow fields. Enter detail description as necessary.**
Create New Case Plan Documents – Updated Case Plan Document 	The Case Plan Update is a Word document that is filled in from the entries made in prior notebooks. SW can review and edit the document, adding narrative in areas that cannot be automatically populated. Save/Print/Close **To print 'Individual Client Responsibilities' for a participant – select from Case Plan Reports under File / Print Report.**
ACTION / APPROVAL **SAVE TO DATABASE**	Request 'pending approval' here. If approval button is greyed out – check **HELP** for approval criteria. **After Supervisor approves Case Plan, record Parental Review/Date Signed on the ID page.**

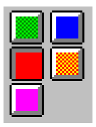
Complete this entire guide for the next Case Plan for the child/children split out.

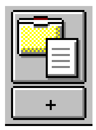
QUICK GUIDE TO CREATING A TRANSITIONAL LIVING PLAN or the 90 DAY TRANSITION PLAN

The Transitional Independent Living Plan document is located in the Case Document notebook.

The TILP document: version 07/08 can be created at anytime, for any child, regardless of age.

Create New Document - Case





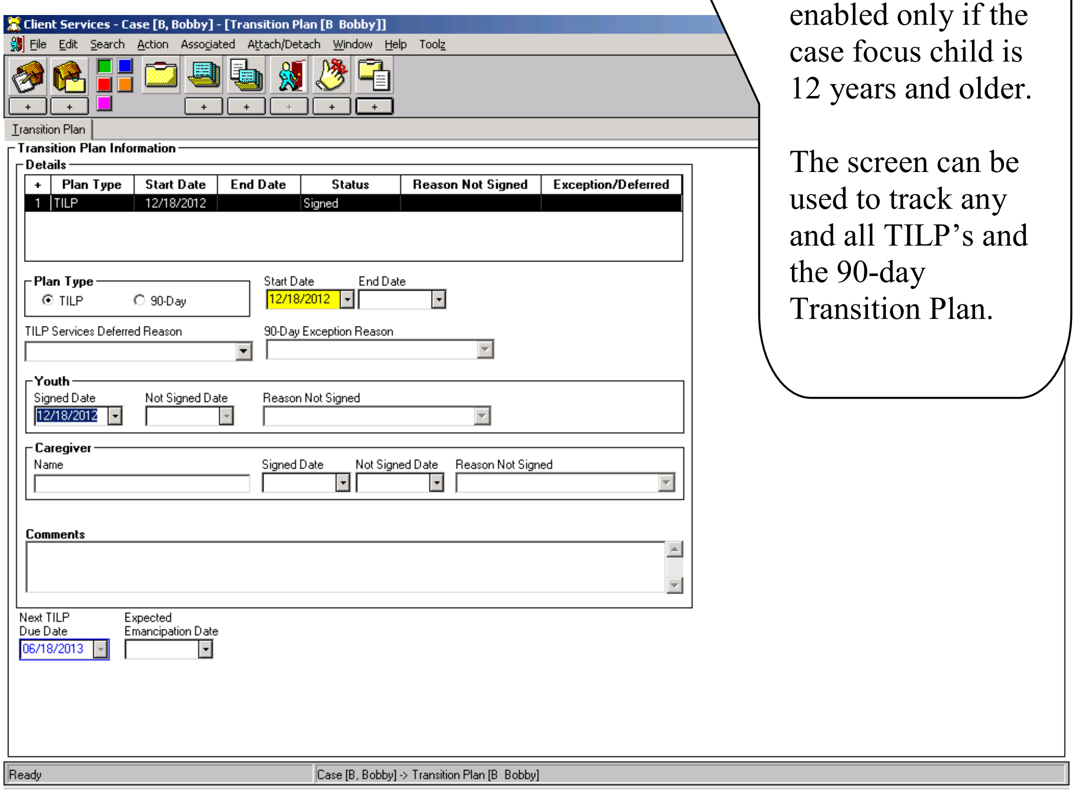
From the list of documents, choose Transitional Independent Living Plan or the 90 Day Transition Plan, then click OK.

The document can also be created in Spanish.

The document can be modified, spell checked, printed, and saved to the database.

Transition Plan tracking page:

This page can be used to track both the TILP and the 90-Day Transition Plan documents. This notebook is child specific, so you must be in the child's cas… ou cannot access siblings' information from the open child's case.



The plus + in the corner will be enabled only if the case focus child is 12 years and older.

The screen can be used to track any and all TILP's and the 90-day Transition Plan.

The Tracking Page can be used to document the youth's participation and signature in the TILP process, as well as the caregiver's signature.

TILP Deferral can be documented, and reasons why not signed.

TILP Svcs Deferred Reasons	**90-Day Exception Reasons**	**Reason Not Signed**
Case Suspended	**Deceased**	**Developmental Disability**
Declined Services	**Refused to Participate**	**Mental Disability**
Mental Disability	**Unable to Locate**	**Physical Disability**
Physical Disability	**Unable to Participate**	**Refused**
	Other	**Whereabouts Unknown**

Caregiver Reason Not Signed

No Caregiver
Not Present
Refused
Other

This page can be accessed after the case has been closed to continue documentation of TILP's. User must have 'closed case/referral' privilege in order to do so and can only access their county's closed cases.

SAVE TO DATABASE

Case Plan in CWS/CMS -Frequently Asked Questions

Do I have to open each child's case in order to do a Case Plan?
No, you can complete a Case Plan for multiple children in only one child's case that will be accessible in all cases – as long as you include them as a Case Plan participant.

Is there ever a time when I should open each child's case?
Yes – when 'splitting a case plan'. A case plan is split, when the 'in effect' Case Plan includes more than one Focus child, and the update will NOT include all of the same children.

I can't select all siblings as 'focus' children for my case plan?
All 'focus' children must have an open case. Then, check the 'related clients' page for each child to make sure they are related as siblings.

I am trying to ask for approval for my Case Plan……why is my Approval button greyed out?
- Yellow Field has not been completed. (Save to Database to find quickly)
- Primary Language or Primary Ethnicity missing for a Focus Child (Client Notebook, Id Page)
- Case Plan Goal missing for a Focus Child (CP Participants Page in Case Plan Notebook)
- At least one service objective for at least one Case Plan participant (Service Objectives Page in Case Plan Notebook)
- Case Plan document has not been created – if an Initial Case Plan
- Case Plan Update document has not been created – if a Case Plan Update.
- Case Plan Appropriateness Description box blank – if a Case Plan Update. (ID page of Case Plan Notebook)

Can I spell check my Case Plan Document?
Yes! Once you have a Word document open, all the usual Word tools are available.

If I make changes to the Case Plan Word document, will it update the screens also?
No, changes, spell checking, etc to the Word document will only affect the Word document. The screens where the information originally was entered will still be wrong!

I have updated my screens, and saved to Database. Why won't my document reflect those changes?
The 'OLD' document must be removed, so that you can create a 'NEW' document.

Is it possible to modify a Case Plan that has already been approved?
Yes! A supervisor (or someone with approval authority in CWS/CMS), can do this. Under Action – and Approval…….change to 'Required Modifications.' That will allow the Case Plan to be changed.

Case Plan Effective Date:
Supervisor controls the effective date of case plan – by adjusting it to the date they want, then Approve. The date defaults to today's date, but should be back dated to actual signed date.

Does the Case Plan Approval have any effect on Outcomes?
Yes! If the case plan contains a visit waiver, it won't take effect in the monthly visit outcome measure until approved.
Parental involvement/engagement efforts must be entered on the ID page of Case Plan – this measure not yet in place, but will be in the future