



# **CWS/CMS**

## **(Assessment and Case Plan)**

Create an Initial Case Plan

### **Process Map**

# Process Map Overview

You will be using the Scenario Manager (SM) application along with the New User Curriculum for completing your Skill Building Exercises. Please be advised that SM is a stand-alone application i.e., it uses client information specific to each exercise that is stored on your hard drive. You are not connected to a network and therefore do not access the database. While every effort has been made to have SM appear and operate just as the Child Welfare Services/Case Management System (CWS/CMS) application does, SM is limited in scope to the particular exercise you are doing. Any reference to the Database (e.g. Save to Database or doing a Client Search) only involves data stored on your workstation intended to support the SM application.

This Process Map guides you through New User Curriculum Skill Building Exercises. Use this Process Map as a guide when you are working in the SM application. These maps can also be used as reference for the live application. Please check your county policies for processes that may differ.

In this Scenario you will complete the following:

- Open Scenario Manager (SM) software and the corresponding scenario package
- Open the existing Case
- Update Client notebooks and pages that are essential to the case plan process
- Create and record information in the Case Plan notebook
- Create the Case Plan Family Assessment and the Child Welfare Services Case Plan documents
- Record the participant review information
- Request approval for the case plan

## 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.

## Svc Comp

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

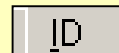
## UPDATE CLIENT NOTEBOOK PAGES



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).

## Demog.

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

## Related Clients

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**.

CP Participants

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**.

Contributing Factors

29. Click the **Contributing Factors** page tab.
30. Click the “+” in the **Contributing Factors** grid.
31. Complete all mandatory (**yellow**) and known **fields**.

Strengths

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

33. Click the “+” in the **Strengths** grid.
34. Complete all mandatory (**yellow**) and known **fields**.

Service Objectives

35. Click the **Service Objectives** page tab.
36. Click the “+” in the **Service Objectives** grid.
37. Complete all mandatory (**yellow**) and known **fields**.

Planned Client Services

38. Click the **Planned Client Services** page.
39. Click the “+” in the **Planned Client Services** grid.
40. Complete all mandatory (**yellow**) and known **fields**.

Case Mgmt Svcs

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.

Scenario Manager File: M03\_S02 Assessment and Case Plan – Initial.arc

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

| Participant Name  | Review Date | Signed Date | Refused to Sign Date | Refused to Participate Date |
|-------------------|-------------|-------------|----------------------|-----------------------------|
| 1. [B. Mace (10)] |             |             |                      |                             |
| 2. [B. Mace (10)] |             |             |                      |                             |
| 3. [B. Mace (10)] |             |             |                      |                             |
| 4. [B. Mace (10)] |             |             |                      |                             |

Participant Name: [B. Mace (10)] Review Date: [ ] Signed Date: [ ] Refused to Sign Date: [ ] Refused to Participate Date: [ ]

Reason Not Signed/Comments: [ ]

*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

**Action**

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

65. Select **Approval**.

66. Click **Pending Approval**.

67. Click **OK**.

## SAVE TO DATABASE

**File**

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*