CWS/CMS (Assessment and Case Plan)

Create an Updated 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.

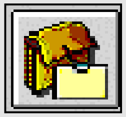
In this Scenario you will complete the following:

- Open Scenario Manager (SM) software and the corresponding scenario package
- Open the existing Case
- Update the client’s progress in meeting the service objectives set forth in the prior case plan
- Create and record information in the Case Plan notebook
- Create the Child Welfare Services Case Plan Update document
- Record the participant review information
- Request approval for the case plan update

Scenario Manager File: M03_S03 Assessment and Case Plan – Update.arc

OPEN CLIENT SERVICES

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



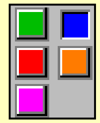
2. Click the **Open Existing Case Folder** button.
3. Use the **Open Folder** dialog box to select the Case you want to open.
4. Click **OK**.
5. Click **Yes**.
6. Repeat the above steps to open the case folders for each focus child.

UPDATE CASE INFORMATION NOTEBOOK PAGES

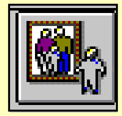
7. Update the **Intervention Reason,** the **Projected End Date** and the **Case Status** on the **Case ID** page for each child's case.

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

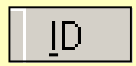
UPDATE CLIENT NOTEBOOK PAGES



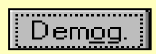
10. Click the **Client Management Section** (**blue** button).



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



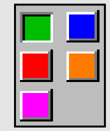
14. Verify the accuracy of the **Language** and **Ethnicity fields** on the **ID** page.



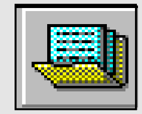
15. Click the **Demog.** page tab to update the **Education and Health Information fields**.

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

UPDATE CASE PLAN



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



19. Click the **Open Existing Case Plan** notebook.
20. In the **Open Notebook** dialog box, select the **In Effect** case plan.
21. Click **OK**.

22. Click the **Service Objectives** page tab.
23. Record the **Service Objectives Progress** by clicking on each row in the **Service Objectives** grid.
24. Select the applicable **met** option button, and type a narrative in the **Progress** narrative field.
25. Repeat the above steps for each service objective.

Scenario Manager File: M03_S03 Assessment and Case Plan – Update.arc

OK - Go to Update | All Service Objectives Met/Progress recorded. Continue with Update

26. Click the **OK-Go to Update** button.

27. Select the **child(ren)** for whom this case plan is being created.

28. Click the top **Add** button.

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

30. Click the bottom **Add** button.

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

Service Objectives
Copy All

32. Click on **Copy All Checkboxes** and **Service Objectives**.

33. Click **OK**.

Case Plan Update Appropriateness Description
Parents continue receiving counseling sevices. Children are doing well in foster care. Pending

34. On the **ID** page enter the reason for the update in the **Case Plan Update Appropriateness Description** text box.

CP Participants

35. Click the **CP Participants** page tab.

36. Click the **Case Plan Goal** drop-down list.

37. Enter a **Case Plan goal** for each child in the **Case Plan Participants** grid.

38. Update all **fields** on the page.

Contributing Factors

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

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

Strengths

41. Click the **Strengths** page tab.

42. Update and complete all mandatory (yellow) and known **fields**.

Service Objectives

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

44. Update and complete all mandatory (yellow) and known **fields**.

Planned Client Services

45. Click the **Planned Client Services** page tab.

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

47. Update and complete all mandatory (yellow) and known **fields**.

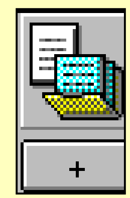
Case Mgmt Svcs

48. Click the **Case Mgmt Svcs** page tab.

49. Click the **"+"** in the **Case Management Services** grid.

50. Update and complete all mandatory (yellow) and known **fields**.

CREATE CASE PLAN DOCUMENT



51. Click the **"+"** to **Create New Document - Case Plan**.

52. Click the **CWS Case Plan Update**.

53. Click **OK**.

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

55. Click **OK**.

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

57. Click **No** in the **Case Plan Update** dialog box.

58. Review the document for accuracy.

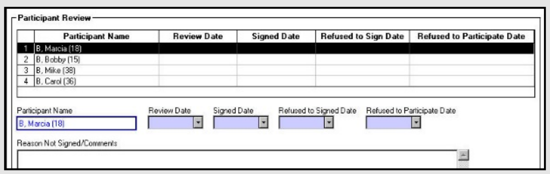
59. Click the **File** drop-down menu.

60. Select **Print**.

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

62. Click the **ID** page.

RECORD PARTICIPANT REVIEW



Complete all applicable fields in the Participant Review grid.

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

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

65. 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

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

67. Select **Approval** in the drop-down list.

68. Click the drop-down list in the **Approval Status** field in the **Approval Detail** (Case Plan) dialog box.

69. Click **Pending Approval.**

70. Click **OK.**

SAVE TO DATABASE

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

72. Select **Save to Database**.

73. Click **Exit CWS/CMS**.