

March Tip of the Month Presented by the FSFN Consultant Network. Special thanks to

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## CASE PLAN WORKSHEET

***Only ONE case plan worksheet should be completed throughout the life of the case. All changes made to the case plan will be edited in the worksheet.***

- 1) Select Case Book next to your case name
- 2) On the right side panel under Case Action select Case Plan Worksheet to create a new Case Plan Worksheet
  - ***Once saved the Case Plan Worksheet can be located under assessment and planning, use the drop down menu in the center column of case book.***
- 3) A new box opens. Select the radio button to the FFA-Ongoing and select continue.
- 4) Under Case Information at the top
  - ***Select Case Plan Type: Judicial, Non-Judicial In Home and Non-Judicial Out of Home***
  - ***Determine if you are going to include Substitute Caregiver Responsibilities, if so check the box***
- 5) Under the Participant/Family Change Strategy, ensure that all the children and parents are included that will participate in the case plan.
  - ***Under Family Support Network, include all parties that provide support to the family. When clicking on insert, a box will populate where you can select who you want to add as a family support. These individuals are inserted in your maintain case page under Professional/Family Support Network Contacts.***
- 6) Under Family Change Strategy ensure the Danger Statement, Family Goal, Ideas and Potential Barriers are correct
  - ***If changes need to be made select FFA-Ongoing/Progress Update ID hyperlink at the top of the screen to open the FFA-Ongoing/Progress Update and make changes there.***
  - ***Changes to the Danger Statement can only be made in FFA-Ongoing.***
- 7) Under Visitation/Family Time/Placement Tab click insert under Visitation/Family time
- 8) A new box opens which allows you to select the children and adults in which the family time occurred.
- 9) Once the appropriate people are selected, click continue
  - ***Multiple boxes can be selected, however, will appear as individual lines***
- 10) Select the appropriate visitation/family time and who is responsible
  - ***This needs to be done for each visitation/family time that has been completed with the family***
- 11) Your current placement populates from Out of Home Placement
- 12) Answer the questions about the placement

- **If there are multiple children, you will need to highlight the radio button to answer the same questions for each child**
- 13) Department of Revenue (DOR) Child Support
  - **This information will populate from the DOR website. We are not able to edit this information**
- 14) Under Child Support, click insert
- 15) Select the appropriate Payor, Payee, Child, Frequency, Amount and Start Date
  - **You can only select one child at a time, so this needs to be repeated if there is more than one child.**
  - **You can also only select one parent at a time, so if both parents are paying child support you will need to repeat the process**
- 16) Under the Additional Child Information Tab. Ensure the Medical/Mental Health and Education Tabs have been updated prior to starting the Case Plan work sheet. If updates need to be made this can be done in case book.
- 17) Select the radio button next to each child to update Medical/Mental Health and Education questions.
- 18) Under the Master Trust – select yes or no under Does child need Master Trust Account Established.
- 19) Under the Summary of Child in Care Needs – Child Functioning and Child Needs populates from the FFA-Ongoing/Progress Update.
  - **If changes need to be made select FFA-Ongoing/Progress Update ID hyperlink to open the FFA-Ongoing/Progress Update and make changes there**
- 20) Under Recommended Case Plan Permanency Goals select primary and concurrent goal.
  - **The primary and concurrent goal for future JRs are pulled from the legal tab, not from this section**
- 21) Under Caregiver Protective Capacities - Adult Functioning, Parenting and Protective Capacities populates from the FFA-Ongoing/Progress Update.
  - **If changes need to be made select FFA-Ongoing/Progress Update ID hyperlink to open the FFA-Ongoing/Progress Update and make changes there**
- 22) Under the Outcome Tab select Add Outcomes. From the drop down menu select the appropriate Outcome
  - **The most popular outcome will be Additional outcome, as defined**
- 23) In the box below add a SMART outcome.
- 24) Under Applies to the following Participants expando: Select only one participant.
  - **Only one participant should be selected as you will need to determine overall outcome progress on the Progress Update. If more than one participant is selected for this outcome and one participant has excellent progress while the other participant has no progress you will not be able to document this on the Progress Update**
- 25) Add the Outcome achievement statement
- 26) Select Insert to add task
  - **You can add more than one task for each Outcome**

- 27) Complete Who, Actions/Tasks, estimated completion date, responsible party for cost, location of delivery of services, date of referral, service referral request needed, frequency of service, provider, service category and sub-service category
- 28) Under Attachments tab – document what is attached and will be file to the court. Anything not attached will need a reason
  
- 29) Once Case Plan Worksheet is completed go back to Casebook.
- 30) On the right side panel under Case Action – click on "Legal Document" Link
- 31) A new box will appear - Click on 'Create'
- 32) In the drop down box for Document (under the "General Information Section")
  - **Choose the "Court Involved Case Plan"**
- 33) Expand the "Case Plan Worksheet ID".
  - **Click on the case plan worksheet you want to use to create the case plan.**
- 34) In the County Drop down select the appropriate county.
- 35) In the Court Case Number drop down select the case number
  - **this will only appear if legal has added the case number to FSFN**
- 36) Under "Case Participants and Professional Contacts"
  - **Choose participants for case plan.**
- 37) On right side of screen click on the blue "Text" Link, which will launch the case plan in Word
- 38) DO NOT save this legal document unless it has been approved by the court. Once the document is opened in word you can print it, it can then be reviewed by your supervisor and taken to court as a draft.
- 39) After it has been approved by the court, repeat steps 29-36 and save to FSFN
  
- 40) If you would like to add additional individuals to the case plan i.e. GALs, Attorneys, Providers, etc.
- 41) From the desktop of FSFN
- 42) Click on case link (maintain case page)
- 43) Under the 4th tab "Professional/Family Support Network Contacts".
  - **You can insert additional participants.**
- 44) Professional Contacts – Must be added to FSFN
- 45) Family Support Network Contacts – Can be anyone providing support to the family
- 46) Remember to “refresh” and then save after any adjustments are made.
- 47) Once the worksheet and legal document is created, if any changes are made to the FFA or Worksheet they both MUST be refreshed and saved or the changes won't carry over to the subsequent documents.