Florida Safe Families Network

Case Plan Worksheet
How Do I … Guide

March 17, 2017

The Florida Safe Families Network (FSFN) How Do I Guide helps you understand the steps to complete your work in the FSFN system. It is a desk reference companion to the User Guide that includes additional details. Visit the DCF FSFN Website (http://fsfn.dcf.state.fl.us) for the User Guide and additional resources.

How Do I…

Create Case Plan Worksheet

How Do I…?	Selections	Tips & Guidelines
Create a Case Plan Worksheet page from the FSFN Desktop	• On FSFN Banner, click **Case Work**. OR • From **Create** menu, click **Case Work**. • The **Create Case Work** page displays. • In the **Case Work Items** group box, select **Case Plan Worksheet** from the **Assessment and Planning** drop down. • In the **Cases** group box, select the appropriate case. • Click **Create**. • The list displays all the pending FFA-Ongoing pages first then, approved pages are sorted by approval date (newest to oldest). Any Progress Update pages display under the associated FFA-Ongoing page. • If there are no **FFA-Ongoing** or **Progress Update** pages associated to the case, you receive a validation error message that at least one page must be created before creating a **Case Plan Worksheet** page. • Click **Continue**. • The Case Plan **Worksheet** page displays. See Case Plan Worksheet page for next steps.	*You can create a Case Plan Worksheet page from your FSFN Desktop or the Case Book. The case must have at least one FFA-Ongoing page or Progress Update page before you can create a Case Plan Worksheet page.* *You do not need to select case participants.* *The list displays all the pending FFA-Ongoing pages first; then, approved pages are sorted by approval date (newest to oldest). Any Progress Update pages display under the associated FFA-Ongoing page.* *If there are no FFA-Ongoing or Progress Update pages associated to the case, you receive a validation error message that at least one page must be created before creating a Case Plan Worksheet page.* *You can select from any FFA-Ongoing or Progress Update page, pending or approved) associated to the case. The information from the selected page pre-fills the Case Plan Worksheet page.*

Create Case Plan Worksheet		
How Do I…?	**Selections**	**Tips & Guidelines**
Create a Case Plan Worksheet page from the Case Book	• On the **Case Book**, in the **Case Actions List Box,** click the **Case Plan Worksheet** hyperlink. OR • On the **Case Book**, click the Cre**ate Case Work** hyperlink. • The **Create Case Work** page displays. • In the **Case Work Items** group box, select **Case Plan Worksheet** from the **Assessment and Planning** drop down. • Click **Create**. • The **FFA-Ongoing/Progress Update Select** Pop-up page displays. • In the **FFA-Ongoing/Progress Update Selection** group box, select the appropriate **FFA-Ongoing or Progress Update.** • Click **Continue**. • The **Case Plan Worksheet** page displays. See Case Plan Worksheet page for next steps.	*You do not need to select a case or case participants. FSFN uses the same case from the Case Book.* *You can select from any FFA-Ongoing or Progress Update page, pending or approved) associated to the case. The information from the selected page pre-fills the Case Plan Worksheet page.*

Access a Case Plan Worksheet Page

How Do I…?	Selections	Tips & Guidelines
Access a Case Plan Worksheet page from the FSFN Desktop	• On the FSFN Outliner, click the **Cases** expando. • Click the **Case Folder** icon, then the **Assessment and Planning** icon. • Click the appropriate **Case Plan Worksheet** hyperlink. • The **Case Plan Worksheet** page displays in edit mode.	*The Case Plan Worksheets display with other assessment and planning work. They display sorted by newest to oldest of create date. Under the Case Plan Worksheet hyperlink, the Case Plan Type and Completed Date, if available, display.* *By default, only Case Plan Worksheets that have been updated within the last 24 months display on the Desktop. You must clear the Date Restricted checkbox on the Desktop to display Case Plan Worksheets that have not been updated within 24 months.*
Access a Case Plan Worksheet page from the Case Book	• On the **Case Book**, from the **Work Type** drop down above the center group box, select **Assessment and Planning**. • In the center group box, click the appropriate **Case Plan Worksheet** hyperlink. .	*The Case Plan Worksheets display with other assessment and planning work. They display sorted by newest to oldest of create date. Under the Case Plan Worksheet hyperlink, the Case Plan Type and Completed Date, if available, display.* *If more pages exist than what is being displayed in the Center Panel when Assessment and Planning is selected, a message will display: More History exists, please see the Desktop. In this case, you must go to your FSFN Desktop and clear the Date Restricted checkbox in order to view more Case Plan Worksheets or additional assessment and planning pages that might be available.*

Access a Case Plan Worksheet Page

How Do I…?	Selections	Tips & Guidelines
Access a Case Plan Worksheet page from the Person Book	• On the **Person Book**, from the **Work Type** drop down above the center group box, select **Assessment and Planning**. • In the center group box, click the appropriate **Case Plan Worksheet** (Case ID) hyperlink. .	*The Case Plan Worksheets display with other assessment and planning work. They display sorted by newest to oldest of create date. Under the Case Plan Worksheet (Case ID) hyperlink, the Case Plan Type and Completed Date, if available, display.* *If more pages exist than what is being displayed in the Center Panel when Assessment and Planning is selected, a message will display: More History exists, please see the Desktop. In this case, you must go to your FSFN Desktop and clear the Date Restricted checkbox in order to view more Case Plan Worksheets or additional assessment and planning pages that might be available.*
Access a Case Plan Worksheet page from the Search page	• On the FSFN Desktop, click **Search** on the banner. OR • On the Desktop, from the **Utilities** menu, click **Search**. • From either the **Case** or **Person** tab, conduct a search to locate the appropriate case or person. • After the search is conducted and the appropriate case or person is found, expand the case or person in the search results. • Click the **Assessment and Planning** icon. • Click the appropriate **Case Plan Worksheet** hyperlink. • The **Case Plan Worksheet** page displays in view-only mode. • The **Case Plan Worksheet** page is only accessible in view-only mode from the **Search** page, even if you have an assignment to the case.	*You can also assess the Case Plan Worksheet page through the Case Book or Person Book hyperlinks on the Search page.* *The Case Plan Worksheet pages display with other assessment and planning work. They display sorted by newest to oldest of create date. Under the Case Plan Worksheet hyperlink, the Case Plan Type and Completed Date, if available, display.* *By default, only Case Plan Worksheets that have been updated within the last 24 months display on the Search page. You must clear the Date Restricted checkbox on the Search page to display Case Plan Worksheet pages that have not been updated within 24 months.* *For more information on searching for a case or person, see the Search User Guide on the DCF FSFN website (http://fsfn.dcf.state.fl.us).*

Access the Maintain Case page from Case Plan Worksheet		
How Do I…?	**Selections**	**Tips & Guidelines**
Access the Maintain Case page from Case Plan Worksheet	• In the **Case Information** group box, click the **Case Name** hyperlink. • The **Maintain Case** page displays for the case associated to the Case Plan Worksheet page. • Modify the **Maintain Case** page as needed if it is in edit mode. • Click **Save**. • When you finish editing or viewing the **Maintain Case** page, click **Close**. • The **Case Plan Worksheet** page displays. • At the bottom of the **Case Plan Worksheet** page, click the **Refresh** button.	*The Maintain Case page displays in edit mode if you accessed the Case Plan Worksheet page from your FSFN Desktop under the Cases Outliner, a Case Book, or Person Book; otherwise, it is view-only.* *From the Maintain Case page, you can access other pages. For example, if you need to update the Date of Birth for one of the children, you can click the Person Name hyperlink on the Maintain Case page and access the Person Management page.* *It is important to refresh the Case Plan Worksheet page when information is updated on another page associated to the case. For example, if you updated the Date of Birth for one of the children, the new Date of Birth displays after refreshing.*

Access the FFA-Ongoing or Progress Update page from Case Plan Worksheet		
How Do I…?	**Selections**	**Tips & Guidelines**
Access the FFA-Ongoing or Progress Update page from Case Plan Worksheet	• In the **Case Information** group box, click the **FFA-Ongoing/Progress Update ID** hyperlink. • The **FFA-Ongoing or Progress Update** page that was selected when the **Case Plan Worksheet** page was created displays. • Modify the **FFA-Ongoing** or **Progress Update** page as needed if it is in edit mode. • Click **Save**. • When you finish editing or viewing the **FFA-Ongoing or Progress Update** page, click **Close**. • The **Case Plan Worksheet** page displays. • At the bottom of the **Case Plan Worksheet** page, click the **Refresh** button to update information.	*The FFA-Ongoing or Progress Update page displays in edit mode if it is in pending status and if you accessed the Case Plan Worksheet page from your FSFN Desktop under the Cases Outliner, a Case Book, or Person Book; otherwise, it is view-only.*

Update the Case Plan Worksheet with the most recent FFA-Ongoing or Progress Update page		
How Do I…?	**Selections**	**Tips & Guidelines**
Select an FFA-Ongoing or Progress Update page from which to update the Case Plan Worksheet	• In the **Case Information** group box, click the **Update Link** hyperlink • The **FFA-Ongoing/Progress Update Select** Pop-up page displays. • In the **FFA-Ongoing/Progress Update Selection** group box, select the appropriate **FFA-Ongoing or Progress Update.** • Click **Continue**. • The **Case Plan Worksheet** page displays, updated with data from the selected **FFA-Ongoing or Progress Update.** • Click the **Save** button on the Case Plan Worksheet page to save the new data.	*You can select from any FFA-Ongoing or Progress Update page, (pending or approved) associated to the case to reflect the most recent changes. The information from the selected page pre-fills the Case Plan Worksheet page.* *The **Update Link** hyperlink will only appear on those Case Plan Worksheets accessed from Case Book, if launched from the Desktop.* *Upon clicking the Continue button, the user will be returned to the Case Plan Worksheet page, and the FFA-Ongoing /Progress Update ID will automatically update to reflect the newly selected ID. Click Save in order to update the applicable fields; Participants/Family Change Strategy Tab-Danger Statement, Family Goal, Ideas, and Potential Barriers. The Summary of Child in Care Needs Tab-Child Functioning and Child Needs. The Protective Capacities Tab-Adult Functioning, Parenting, and Protective Capacities. All other fields will remain as they were prior to selecting the new FFA-Ongoing /Progress Update, including the Participants.*

Select the Case Plan Type		
How Do I…?	**Selections**	**Tips & Guidelines**
Select the Case Plan Type	• In the **Case Information** group box, from the **Case Plan Type** drop down, select the appropriate type.	*The Case Plan Type (Judicial, Non-Judicial In-Home and Non-Judicial Out-of-Home) you select determines the information that is captured on the page on the seven tabs.* *Non-Judicial In-Home, does not display all fields on the Visitation/Family Time/Placement tab and Master Trust and Independent Living group boxes on the Additional Child Information tab* *Non-Judicial Out-of-Home, does not display Independent Living group box on the Additional Child Information tab* *If you change the Case Plan Type after entering data, FSFN provides you a validation message stating that changing the type may result in data lost and if you wish to continue.* *When selecting non-judicial a hyperlink appears, which allows you to launch the template*
Select the Dependency Case Manager	• In the Case Information group box, from the Dependency Case Manager drop down, select the appropriate worker.	*The Dependency Case Manager drop down is enabled and required.* *The drop down will contain a list of all workers currently assigned to the associated FSFN Case and the workers associated Unit Name will be displayed in parenthesis directly to the right of the Worker Name.* *This drop down will dynamically update to be current in the event assignments are ended or new assignments created throughout the life of the FSFN Case. This list will display in alphabetical order based on Last Name.*

Add and Remove Case Participants and Family Support Network		
How Do I…?	**Selections**	**Tips & Guidelines**
Add a Child	• On **Participant/Family Change Strategy** tab, review the **Children** group box in the **Household Composition** group box. • In the **Children** group box, click **Insert.** • The **Participant Select** pop-up page displays. • In the **Participant Selection** group box, select the appropriate check boxes for the participants you want to add to the **Case Plan Worksheet** page. • Click **Continue**. • The **Case Plan Worksheet** page displays and the selected participants are added to the **Children** group box.	*There must be at least one child and one caregiver included to save the Case Plan Worksheet page.* *When the Case Plan Worksheet page is created, the Children group box is pre-filled with the same children listed on the Participant tab of the selected FFA-Ongoing page or Progress Update page.* *Children display in alphabetical order by Last Name and Suffix, the First Name, and then the Middle Name.* *You can select multiple participants on the Participant Select pop-up page.* *When inserting from the Children group box, the Participant Selection pop-up page displays only active case participants under the age of 18 which are not already included in the Children or Parent/Legal Guardian(s) /Other Adult Household Members in Caregiving Role group boxes.* *There must be at least one person in the Children group box to save the Case Plan Worksheet page.*

Add and Remove Case Participants and Family Support Network		
How Do I…?	**Selections**	**Tips & Guidelines**
Add a Parent/Legal Guardian(s) /Other Adult Household Members in Caregiving Role	• On **Participant/Family Change Strategy** tab, review the **Parent/Legal Guardian(s) /Other Adult Household Members in Caregiving Role** group box in the **Household Composition** group box. • In the **Parent/Legal Guardian(s) /Other Adult Household Members in Caregiving Role** group box, click Insert. • The **Participant Select** pop-up page displays. • In the **Participant Selection** group box, select the appropriate check boxes for the case participants you want to add to the **Case Plan Worksheet** page. • Click **Continue**. • The **Case Plan Worksheet** page displays and the selected participants are added to the **Parent/Legal Guardian(s) /Other Adult Household Members in Caregiving Role** group box.	*When the Case Plan Worksheet page is created, the Parent/Legal Guardian(s) /Other Adult Household Members in Caregiving Role group box is pre-filled with the same case participants listed on the Participant tab of the selected FFA-Ongoing page or Progress Update page.* *Participants display in alphabetical order by Last Name and Suffix, the First Name, and then the Middle Name.* *When inserting from the Parent/Legal Guardian(s) /Other Adult Household Members in Caregiving Role group box, the Participant Select pop-up page displays only active case participants, regardless of age, which are not already included in the Children or Parent/Legal Guardian(s) /Other Adult Household Members in Caregiving Role group boxes.* *There must be at least one person in the Parent/Legal Guardian(s) /Other Adult Household Members in Caregiving Role group box to save the Case Plan Worksheet page.*

Add and Remove Case Participants and Family Support Network		
How Do I…?	**Selections**	**Tips & Guidelines**
Add a Family Support Network Person	• On **Participant/Family Change Strategy** tab, review the **Family Support Network** group box in the **Household Composition** group box. • In the **Family Support Network** group box, click **Insert**. • The **Participant Select** pop-up page displays. • In the **Participant Selection** group box, select the appropriate check boxes for the person you want to add to the **Case Plan Worksheet** page. • Click **Continue**. • The **Case Plan Worksheet** page displays and the selected participants are added to the **Family Support Network** group box.	*When the Case Plan Worksheet page is created, the Family Support Network group box is pre-filled with the same persons listed on the Participant tab of the selected FFA-Ongoing page or Progress Update page.* *Persons display in alphabetical order by name as listed on the Professional/Family Support Network Contacts tab on the Maintain Case page.* *When inserting from the Family Support Network group box, the Participant Select pop-up page displays only persons listed as Family Support Network contacts listed on the Professional/Family Support Network Contacts tab on the Maintain Case page, which are not already included in the Family Support Network group box.*
Remove a case participant or Family Support Network person	• On **Participant/Family Change Strategy** tab, scroll down to the Household composition section. • Select the participant to be removed. • Under Action, click the Remove hyperlink.	*To Remove a case participant or Family Support Network person from the Case Plan Worksheet, the user will click the Remove hyperlink next to the participant that needs to be removed from the Case Plan Worksheet.*

View a participant’s Case Plan Task Summary		
How Do I…?	**Selections**	**Tips & Guidelines**
View a participant’s Case Plan Task Summary	• In the Parent/Legal Guardian(s)/Other Adult Household Members in Caregiving Role group box, click the Task Summary hyperlink in the row of the desired participant. • The Case Plan Task Summary pop up box displays.	*The Task Summary hyperlink will only display after the Case Plan Worksheet has been successfully saved for the first time.* *Upon launching the new Case Plan Task Summary pop-up page, it will be displayed in view only mode at all times.* *The user can click the Print command button to launch a print screen of the pop-up page, which will display all details captured on the page.*

Add and Delete Visitation/Family Time		
How Do I…?	**Selections**	**Tips & Guidelines**
Add Visitation/Family Time	• On **Visitation/Family Time/Placement** tab, in the **Visitation/Family Time** group box, click **Insert**. • The **Visitation/Family Time Information** pop-up page displays. • In the **Applicable Children** group box, select the appropriate check boxes for the children involved in the visitation. • In the **Visitation/Family Time With** group box, select the appropriate check boxes for the persons with whom the children will visit. • Click **Continue**. • The **Case Plan Worksheet** page and **Visitation/Family Time/Placement** tab display. • In the **Visitation/Family Time** group box, select the appropriate type of visitation from the **Visitation/Family Time** drop down. Values: Supervised; Unsupervised; and Court Ordered No Contact • From the **Who is responsible for Transportation** drop down, select the appropriate person. • In the **Visitation/Family Time Schedule** field, enter information regarding the planned schedule. The field is **not** required and is 1,200 characters. • In the **Visitation/Family Time Restrictions** field, enter information regarding any restrictions for the visitation. The field is not required and is 1,200 characters.	*You may select multiple persons in each group box. FSFN sets up a Visitation/Family Time record for each combination. If you select two children and one person with whom they are visiting, FSFN creates two records.* *You must select at least one person in each group box to continue.* *The Applicable Children group box displays all children listed in the Children group box on the Participants/Family Change Strategy tab.* *The Visitation/Family Time With group box displays all persons from the Participants/Family Change Strategy tab. This includes the children, caregivers, and Family Support Network.* *Children display in both group boxes as a child may have visitation with another child (e.g., separated siblings). Once a child is selected in the Applicable Children group box, the corresponding check box in the Visitation/Family Time With group is disabled. A child would not visit themselves.* *If you select Other in the Visitation/Family Time With group box, you must enter a description of who. The text field is limited to 150 characters.* *FSFN creates a row (record) for each applicable child and visitation with person you selected. The rows are added to the* ***Visitation/Family Time*** *group box. If you select two children and one person with whom they are visiting, FSFN creates two rows.*

Add and Delete Visitation/Family Time		
How Do I…?	**Selections**	**Tips & Guidelines**
Delete Visitation/Family Time	• On **Visitation/Family Time/Placement** tab, click the appropriate **Delete** hyperlink associated to the Visitation/Family Time row you wish to delete.	*When you click a Delete hyperlink, FSFN generates a validation message asking if you want to continue with the deletion. If yes, the row no longer displays. Upon successfully saving the Case Plan Worksheet page, the row is deleted from the database.*

Access Placement Information		
How Do I…?	**Selections**	**Tips & Guidelines**
Enter information on Current Placement	• On **Visitation/Family Time/Placement** tab, review current placement information in the **Current Placement** group box. • In the **Current Placement** group box, select the radio button on the placement row to view the placement questions pertaining to the placement. • If there is more than one placement row, you can only select one radio button at a time. The questions change, depending on the placement row radio button you select.	*Placement information displays for children listed on the Participants/Family Change Strategy tab and are in a current Out-of-Home Placement.* *The Current Placement row includes the child's name, placement provider name, placement type, date on which the current placement began, and date of the current removal began. Additionally, a Summary Information hyperlink is available to view the Placement Summary pop-up page.* *For each current placement row, there are seven required questions. The first two questions require you enter narrative. The remaining five questions require you to select a Yes or No radio button. Depending on your selection, you may be required to enter narrative. The narrative fields are 3,200 characters.*

Access Placement Information

How Do I…?	Selections	Tips & Guidelines
View Placement Summary Information	• On **Visitation/Family Time/Placement** tab, review current placement information in the **Current Placement** group box. • On the appropriate Current Placement row, select the **Summary Information** hyperlink. • The **Placement Summary** pop-up page displays. • After reviewing the information, click **Close** to return to the **Case Plan Worksheet** page.	*The Summary Information pop-up page provides the following information:* ***Total # of Placements (current removal episode)*** *- This is the number of placements within the current removal episode. (including current placement)* ***Length of Current Removal Episode (months)*** *- This is the total number of months in the current removal episode.* ***Total # of Removal Episodes*** *- This is the number of all removal episodes. (including current episode)* ***Total Length of Time in Removals (months)*** *- This is the total number of months across removal episodes.* *The calculations for the placement information are consistent with calculations used to produce similar information for AFCARS.*

Access Child Support Information

How Do I…?	Selections	Tips & Guidelines
View Department of Revenue (DOR) Child Support Information	• On **Visitation/Family Time/Placement** tab, review information in the **Department of Revenue (DOR) Child Support Information** group box.	*If there is a DOR Child Support record for any of the children listed in the Children group box on the Participants/ Family Change Strategy tab and the Payor matches a person listed in the Parent/Legal Guardian/ Other Adult Household Members in Caregiving Role group box, the following information displays on a row: Payor, DOR Case Number, Child Name, Child Date of Birth, Child Support Obligation, Last Payment Date, and Last Payment Amount.*

Access Child Support Information

How Do I…?	Selections	Tips & Guidelines
Enter Child Support information not included in Department of Revenue	• On **Visitation/Family Time/Placement** tab, review information in the **Child Support** group box. • In the **Child Support** group box, click **Insert**. • A new **Child Support** row displays. • From the **Payor** drop down, select the appropriate person. • From the **Payee** drop down, select the appropriate person. • From the **Child** drop down, select the appropriate person. • In the **Frequency** field, enter the frequency of the child support payment (150 characters). • In the **Amount** field, enter the amount of the child support payment. • In the **Start Date** field, enter the date when the child support payment started.	*If you have Child Support information not in the DOR information, you can capture the information within the Child Support group box.* *You cannot repeat a Payor/Child combination that is listed in the DOR information.* *In the Payor drop down, FSFN lists persons from the Parent/Legal Guardians(s)/Other Adult Household Members in Caregiving Role group box from the Participants/Family Change Strategy tab. An adult does not appear in the drop down if the adult has a DOR record for each child. You can only have one record for each Payor/Child combination.* *In the Payee drop down, FSFN lists persons from* the participants included in the Parent/Legal Guardian(s)/Other Adult Household Members in Caregiving Role group box on the Participants/ Family Change Strategy tab. *If the Payee is not a person listed, you may select Other and provide a description.* *In the Child drop down, FSFN lists persons from the Children group box from the Participants/Family Change Strategy tab. A child does not appear in the drop down if the selected payor already has a child support record for the child. You can only have one record for each Payor/Child combination*
Delete Child Support information not included in Department of Revenue	• On **Visitation/Family Time/Placement** tab, click the appropriate **Delete** hyperlink associated to the Child Support row you wish to delete.	*When you click a Delete hyperlink, FSFN generates a validation message asking if you want to continue with the deletion. If yes, the row no longer displays. Upon successfully saving the Case Plan Worksheet page, the row is deleted from the database.*

Access Medical/Mental Health Information		
How Do I…?	**Selections**	**Tips & Guidelines**
Access Medical/Mental Health Information	• On **Additional Child Information** tab, review information in the **Medical/Mental Health** group box. • In the **Medical/Mental Health** group box, click the **Medical/Mental Health** hyperlink. • The **Medical/Mental Health** page displays for the child. • Modify the **Medical/Mental Health** page as needed if it is in edit mode. • Click **Save**. • When you finish editing or viewing the **Medical/Mental Health** page, click **Close**. • The **Case Plan Worksheet** page displays on the **Additional Child Information** tab. • At the bottom of the **Case Plan Worksheet** page, click the **Refresh** button. • It is important to refresh the Case Plan Worksheet page when information is updated on another page associated to the case. • In the **Medical/Mental Health** group box, select the radio button for the specific child to view the summary of the child's current medical/mental health status. • If there is more than one child row, you can only select one radio button at a time. The question changes depending on the child row radio button you select. • In the **Summary of child's current medical, dental, and/or mental health issues, treatments and diagnoses** field, enter appropriate information. The field is required and is 2,000 characters.	*Medical/Mental Health information displays for children listed on the Participants/Family Change Strategy tab.* *The Medical/Mental Health hyperlink only displays if the child has a Medical/Mental Health Record in the associated FSFN Case.* *You must have appropriate security for view Medical/Mental Health information. If you do not have the security, FSFN generates a security validation error if you click the Medical/Mental Health hyperlink.* *The Medical/Mental Health page displays in edit mode if you accessed the Case Plan Worksheet page from your FSFN Desktop under the Cases Outliner, Case Book, or Person Book; otherwise, it is view-only.* .

Access Education Information

How Do I…?	Selections	Tips & Guidelines
Access Education Information	• On **Additional Child Information** tab, review information in the **Education** group box. • In the **Education** group box, click the **Education** hyperlink. • The **Education** page displays for the child. • Modify the **Education** page as needed if it is in edit mode. • Click **Save**. • When you finish editing or viewing the **Education** page, click **Close**. • The **Case Plan Worksheet** page displays on the **Additional Child Information** tab displays. • At the bottom of the **Case Plan Worksheet** page, click the **Refresh** button. • In the **Education** group box, select the radio button for the specific child to view the summary of the child's education status. • For question **Is the child performing on grade level? If no, explain what you are doing to remediate,** select the **Yes** or **No** radio button. If you select **No,** enter appropriate information in the narrative field. (2,000 characters) • For question, **If the child is not enrolled in an educational program, which includes a licensed early education or child care program, provide an explanation below**, a text box is available for user entry.	*Education information displays for children listed on the Participants/Family Change Strategy tab.* *The Education hyperlink only displays if the child has an Education Record in the associated FSFN Case.* *The Education page displays in edit mode if you accessed the Case Plan Worksheet page from your FSFN Desktop under the Cases Outliner, a Case Book, or Person Book; otherwise, it is view-only.* *It is important to refresh the Case Plan Worksheet page when information is updated on another page associated to the case.* *If there are more than one child row, you can only select one radio button at a time. The information and questions change depending on the child row radio button you select.* *FSFN displays additional education information for the child. The School Type and Current Grade Level are derived from the most recent Maintain Education History page for the child.* *From the Education page for the child, FSFN displays if the child is an ESE student and if they have an appointed education surrogate parent. If the child is in an Out-of-Home Placement, an ESE student, and do not have an appointed education surrogate parent, you are required to provide an explanation.*

Access Master Trust Information		
How Do I…?	**Selections**	**Tips & Guidelines**
View Master Trust Information	• On **Additional Child Information** tab, review information in the **Master Trust** group box. • On the appropriate child row, select the **Master Trust** hyperlink. • The **Master Trust** page displays. • After reviewing	*If there is a Master Trust record for any of the children listed in the Children group box on the Participants/ Family Change Strategy tab, the following information displays on a row: Child Name, Master Trust Type, and Account Balance.*
Enter Master Trust Information	• On **Additional Child Information** tab, review information in the **Master Trust** group box. • On the **Child Without Master Trust Account** row, select the **Yes** or **No** radio button for question **Does child need Master Trust Account Established?**. If you select Yes, you are required to enter a date when the account will be established. The date must be a future date.	*If a child listed on the Participants/Family Change Strategy tab does not have a Master Trust Account in FSFN, a row displays for you to add additional information.* *FSFN displays additional information for the child: Indication if the Mother and Father are deceased and if the child is receiving SSI.*

Access Independent Living Information

How Do I…?	Selections	Tips & Guidelines
Access Independent Living Information	• On **Additional Child Information** tab, review information in the **Independent Living** group box. • In the **Independent Living** group box, click the **Independent Living** hyperlink. • The **Independent Living** page displays for the child. • Modify the **Independent Living** page as needed if it is in edit mode. • Click **Save**. • When you finish editing or viewing the **Independent Living** page, click **Close**. • The **Case Plan Worksheet** page on the **Additional Child Information** tab displays. • At the bottom of the **Case Plan Worksheet** page, click the **Refresh** button.	*The Independent Living hyperlink and Initial date of referral only displays if the child has an Independent Living Record in the associated FSFN Case.* *The Independent Living information is only relevant for children of age 13 or above. If there are no children of age 13 or above, the entire group box does not display.* *The Independent Living page displays in edit mode if you accessed the Case Plan Worksheet page from your FSFN Desktop under the Cases Outliner, a Case Book, or Person Book; otherwise, it is view-only.* *It is important to refresh the Case Plan Worksheet page when information is updated on another page associated to the case.*

Access Child Functioning and Needs

How Do I...?	Selections	Tips & Guidelines
View Child Functioning Information	• On the **Summary of Child in Care Needs** tab, review information in the **Child Functioning** group box.	*The Child Functioning information displays for any of the children listed in the Children group box on the Participants/ Family Change Strategy tab, the following information displays on a row: Child Name, Date of Birth, and Age.* *For each child, a narrative displays that describes how the child functions on a daily basis. The narrative pre-fills from the selected FFA-Ongoing or Progress Update page when the Case Plan Worksheet page was created.* *You cannot edit the narrative directly on the Case Plan Worksheet page. If the selected FFA-Ongoing or Progress Update is pending, you can edit the narratives on the selected page and refresh the Case Plan Worksheet page, which updates the narrative.*

Access Child Functioning and Needs		
How Do I…?	**Selections**	**Tips & Guidelines**
View Child Needs Information	• On the **Summary of Child in Care Needs** tab, review information in the **Child Needs** group box. • In the **Child Needs** group box, select the radio button for the specific child to view the specific information for the child.	*Child Needs information displays for children listed on the Participants/Family Change Strategy tab. The following information displays on a row: Child Name, Date of Birth, and Age.* *. Based on the child row radio button selection, the child needs information changes.* *For each child, a list of needs and ratings displays and pre-fills from the selected FFA-Ongoing or Progress Update page when the Case Plan Worksheet page was created.* *Only the Needs that display are those with a C or D rating and it was indicated to include in Case Plan on the selected FFA-Ongoing-Protective Capacity Analysis and Family Change Strategy tab-Child Needs group box or Progress Update Page-Child Needs tab, whichever is applicable.* *You cannot edit the needs or ratings directly on the Case Plan Worksheet page. If the selected FFA-Ongoing or Progress Update is pending, you can edit the information on the selected page and refresh the Case Plan Worksheet page, which updates the needs and ratings.*

Access Child Functioning and Needs		
How Do I…?	**Selections**	**Tips & Guidelines**
Enter Recommended Case Plan Permanency Goals	• On the **Summary of Child in Care Needs** tab, review information in the **Recommended Case Plan Permanency Goals** group box. • From the **Primary** drop down, select the appropriate primary permanency goal for each child. • From the **Concurrent** drop down, select the appropriate concurrent permanency goal for each child. • In the **Primary Goal** date, enter the expiration date for the Primary Goal for each child.	*If the Case Plan Type is Non-Judicial In-Home, the Primary defaults to Maintain & Strengthen placement with parent(s) and the Concurrent defaults to blank. You cannot modify either when the Case Plan Type is Non-Judicial In-Home.* *If the Case Plan Type is Judicial or Non-Judicial Out-of-Home, the Primary is enabled. Once you select a Primary goal, the Concurrent is enabled and the values are dependent on the value you selected for the Primary goal.* *The Primary Goal date is a required field and cannot be a past date. It must equal to the current date or a future date.*

Access Caregiver Protective Capacities

How Do I…?	Selections	Tips & Guidelines
View Adult Functioning Information	• On the **Protective Capacities** tab, review information in the **Adult Functioning** group box.	*The Adult Functioning information displays for adults in a caregiver role that is listed on the Participants/ Family Change Strategy tab, the following information displays on a row: Adult's Name, Date of Birth, and Age.* *For each adult, a narrative displays that describes how the adult functions on a daily basis. The narrative pre-fills from the selected FFA-Ongoing or Progress Update page when the Case Plan Worksheet page was created.* *You cannot edit the narrative directly on the Case Plan Worksheet page. If the selected FFA-Ongoing or Progress Update is pending, you can edit the narratives on the selected page and refresh the Case Plan Worksheet page, which updates the narrative.*
View Parenting Information	• On the **Protective Capacities** tab, review information in the **Parenting** group box.	*The Parenting information displays for adults in a caregiver role that is listed on the Participants/ Family Change Strategy tab, the following information displays on a row: Adult's Name, Date of Birth, and Age.* *For each adult, a narrative displays that describes how the adult's parenting practices. The narrative pre-fills from the selected FFA-Ongoing or Progress Update page when the Case Plan Worksheet page was created.* *You cannot edit the narrative directly on the Case Plan Worksheet page. If the selected FFA-Ongoing or Progress Update is pending, you can edit the narratives on the selected page and refresh the Case Plan Worksheet page, which updates the narrative.*

Access Caregiver Protective Capacities

How Do I…?	Selections	Tips & Guidelines
View Protective Capacities Information	• On the **Protective Capacities** tab, review information in the **Protective Capacities** group box.	*The Protective Capacities information displays for adults in a caregiver role that is listed on the Participants/ Family Change Strategy tab.* *For each adult, a list of protective capacities and ratings displays and pre-fills from the selected FFA-Ongoing or Progress Update page when the Case Plan Worksheet page was created.* *The capacities that display are only those with a C or D rating and it was indicated to include in Case Plan on the selected FFA-Ongoing or Progress Update page.* *You cannot edit the capacities or ratings directly on the Case Plan Worksheet page. If the selected FFA-Ongoing or Progress Update is pending, you can edit the information on the selected page and refresh the Case Plan Worksheet page, which updates the needs and ratings.*

Add and Delete Outcomes

How Do I…?	Selections	Tips & Guidelines
Add Outcome	• On the **Outcome** tab, click the **Add Outcome** button. • FSFN adds an **Outcome** group box. • From the **Outcome** drop down, select the appropriate outcome. • In the **Outcome** group box, click the **Applies to the following Participants** expando. • Select the appropriate case participants to who the outcome applies. • You can select multiple case participants. At least one case participant is required. • In the **Outcome Achievement** field, enter a description of what constitutes the achievement of the identified outcome. The field is required. (up to 200 characters) • In the **Est. Cost to Parents(s) (if Applicable)** field, enter an amount if appropriate. The field is not required. • **Terms for Estimated Cost to Parent(s)** text field an optional user-entered text describing the terms, such as number of units, or amount of the total, of the amount indicated in Est. Cost to Parent(s)	*There must be at least one outcome included to complete the Case Plan Worksheet page.* *There must be at least one action/task associated to each Outcome.* *You are required to provide a description of the outcome if you select Additional outcome, as defined.* *FSFN displays check box next to all the case participants' names which are captured in the Children and Parent/Legal Guardian(s)/ Other Adult Household Members in Caregiving Role group boxes on the Participants/Family Change Strategy tab.* *If a participant has been selected who is subsequently removed from the Participants/Family Change Strategy tab, when you refresh the Case Plan Worksheet page, the case participant is removed from the outcome.*

Add and Delete Outcomes		
How Do I…?	**Selections**	**Tips & Guidelines**
Add Action/Task	• On the **Outcome** tab, in the **Outcome** group box, click **Insert**. • From the **Who** drop down, select the appropriate person that is responsible for completing the action/task. • In the **Actions/Tasks** field, enter a description of the action/task associated to the identified outcome. • In the **Estimated Completion Date**, enter the appropriate date. The date can be any date (past, current, or future). • In the **Responsible Party for Cost** field, enter who is responsible for the cost if appropriate. • In the **Location of Delivery of Services** field, enter where the services is going to be delivered. • In the **Date of Referral**, enter the appropriate date. The date cannot be a future date • From the **Service Referral Request Needed?** drop down, select ***Yes*** or ***No***. • In the **Frequency of Service** field, enter the frequency by which the service needs to occur. • If the provider is in FSFN, you can click the **Search** hyperlink to search the appropriate provider and the Provider Name displays in the field. Otherwise, you can enter a provider name directly into the field. • From the **Services Category** drop down, select the appropriate service category. • From the **Sub-Services Category** drop down, select the appropriate sub-service category. .	*The Who drop down contains the names of all participants included in the Children, Parent/Legal Guardian(s)/ Other Adult Household Members in Caregiving Role and Family Support Network group boxes, as well as a static value of Case Manager* *The following fields are required if a service referral request is needed: Responsible Party for Cost, Location of Delivery of Services, Date of Referral, Frequency of Service, Services Category, and Sub-Services Category.*

Add and Delete Outcomes

How Do I…?	Selections	Tips & Guidelines
Add Action/Task Cont'd	• When the action/task is completed, select the **Task Completed** check box. The **Authorization** hyperlink displays the Service Authorization page for new tasks, this creates the Service Authorization prefilled with Case, participant (Who), Service Category, and Provider. • **Status** text displays the associated Service Authorization, if one exists. • The user can select the **Accept** hyperlink to accept the values from the service authorization for: Service Category; Service Sub Category and Provider. • The **Authorization Details** displays summary information from the associated Service Authorization including amount and units authorized.	
Delete Outcome or Action/Task	• On the Outcome tab, click the appropriate **Delete** hyperlink associated to the Outcome or Action/Task row you wish to delete.	*When you click a Delete hyperlink, FSFN generates a validation message asking if you want to continue with the deletion. If yes, the row no longer displays. Upon successfully saving the Case Plan Worksheet page, the row is deleted from the database.* *<u>Note:</u> The delete hyperlink does not appear until the Case Plan Worksheet is saved.*

Document Attachments		
How Do I…?	**Selections**	**Tips & Guidelines**
Document Attachments to Case Plans	• On the **Attachments** tab, you must select either the **Attached** or **Not Attached** radio button for the Medical/Mental Health Records, Education, Independent Living, and Master Trust documents. • If you select **Not Attached**, you are required to document the reason why.	*There are optional documents listed. Select the appropriate check box if you plan to attach the optional document to the court report.* *If you select the **Other** check box, you are required to enter a description of the document.*