How do I…

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Create a Case Plan Task – (Court Involved Case Plan)	▪ From the Desktop menu option, select **Case Plan Task** ▪ Create > Case Work > Planning > Case Plan Task > Family Name > Create ▪ From the Purpose field in the Header group box, select the appropriate option. ▪ If 'Adoption Case Plan' is selected from the Purpose field, select the appropriate 'Type' of Adoption Case Plan. ▪ Enter an expiration date in the **Expiration Date** field in the Header group box.	*A Case Plan Task is completed on the entire family.* *If a Family Assessment has been created, you will receive a pop-up that says: Do you want to create a Case Plan Task from the most recent Family Assessment?* *The Purpose field dropdown has four options:* *Adoption Case Plan* *Initial Case Plan* *Updated Case Plan* *Voluntary Case Plan* *The **Case Plan Status** field is pre-filled in the header group box and is not user modifiable with one of two plan status values:* ***Pending** – indicates the plan has been created but has not received supervisory approval.* ***Approved** - indicates the plan has been approved by a supervisor.*
Participants Tab	▪ Case Plan Tasks page has six tabs. Page defaults to the Participants tab. ▪ Select the appropriate 'Mother's Name' if applicable. ▪ Insert the appropriate 'Father's Name(s)' if applicable. ▪ Click the **Save** button.	*The six tabs on Case Plan Task page are: Participants, Strengths, Needs, Ongoing Responsibilities, Development and Attachments.* *While it is not required that you save your work on one tab before moving on to the next tab, it is 'good practice' to do so.*
Strengths Tab	▪ The strengths carried forward from the Family Assessment will display on the Strengths tab. ▪ Enter supporting information in the text field. ▪ Click the **Save** button.	*Strengths cannot be inserted at the Case Plan Tasks page level. Therefore, only in the event the Case Plan Tasks page is created from a Family Assessment and identified strengths are selected to be included in the Case Plan will strengths pre-fill. Otherwise the field will be blank.*
Needs Tab	▪ Select the Needs tab. ▪ If the Case Plan Task is created from the most recent Family Assessment, the narrative field labeled "Describe the reasons and circumstances related to removal or reasons for agency involvement." pre-fills from the Family Assessment text field labeled "Describe how the agency's intervention began, the length of involvement and the circumstances that warrant continued services." ▪ In addition, if created from the most recent Family Assessment	*Selecting the <u>Edit</u> hyperlink opens the Maintain Case Plan Item pop-up page which allows the user to edit the Need.* *Once the plan is approved, the <u>Edit</u> hyperlink becomes a <u>View</u> hyperlink and the Delete hyperlink is no longer available for selection.*

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	the Needs carried forward and will display on the Needs tab. ▪ The Delete hyperlink allows the user to delete a Need from the page prior to Supervisor Approval. ▪ The Edit hyperlink allows the user to edit a Need on the page prior to Supervisor Approval. ▪ The **Insert** button allows the user to insert a new Need to the page prior to Supervisor Approval. ▪ Enter supporting information in the required text field. ▪ Click the **Save** button.	
Ongoing Responsibilities Tab	▪ Select the Ongoing Responsibilities tab. ▪ Select the checkbox for Include Standard Caregiver Responsibilities. ▪ Enter any needed supporting information in the text field. ▪ Select the checkbox to include the Case Managers Tasks where Case Plan Goal for any child is APPLA or at least one child is 17 years of age AND in Licensed Care. ▪ Click the **Save** button.	*This information is pre-filled from Florida Statutes, Chapter 39. By selecting the checkbox, the standard caregiver responsibilities language will be displayed on the case plan template when launched.* *By selecting the Case Managers Tasks checkbox, specific tasks will automatically pre-fill the Case Plan template.*
Development Tab	▪ Select the Development tab. ▪ Review the system derived response to the statement **This Case Plan Task is based on Family Assessment** ▪ Select the checkbox **Add to Template** for rows needed to prefill Case Plan template. ▪ Select responses from the **Participation** and **Type of Contact** dropdowns for each participant.	*The user documents the participation in the development of the case plan.* The statement **"This Case Plan is based on a Family Assessment."** is system derived based on the user's selection at the time of creating the Case Plan Task page when indicating if they wish to create the Case Plan Task page based on the most recent Family Assessment. If "Yes" the answer will be system derived as "Yes." If "No" the answer will be system derived as "No." If either no Family Assessment has been created or the only Family Assessments which have been created are "Not Approved" and the user continues with creating the Case Plan Task page the answer will be system derived as "No." *If **Other** is selected from the **Type of Contact** dropdown, the untitled text field at the end of the row becomes enabled to allow the user to specify type of contact.*

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	▪ Enter the date in the **Contact Date** field for each participant. ▪ Enter supporting information in the three required text fields. ▪ Click the **Save** button.	***Contact Date*** *is a required field.*
Attachments Tab	▪ Select the Attachments tab. ▪ Select the checkboxes for the documents which will be attached to the Case Plan Template. ▪ Enter supporting information in the text field to provide explanations if any of the documents are not attached. ▪ Select the **Completed** checkbox in the header group box. ▪ Click the **Save** and **Close** buttons.	*The following documents must be attached to the Case Plan Template:* *Medical Mental Health, to include medical records, mental health records, immunization records, dental records.* *Visitation Plan(s), to include parents, siblings, grandparents, (if applicable).* *Education, to include report cards, Individual Educational Plan (IEP), other school records.* *Master Trust (if applicable), to include quarterly accounting statement, Notice of Fee Assessment and Rights of Foster Child Regarding Government Benefits, Rights and Responsibilities, Out of Home Plan (if applicable).* *The Completed checkbox validates that all Case Plan Task tabs are completed. If any information is missing, the user will receive a Validation Message. Each Case Plan Task created will have a system generated task id #.*
Create a Case Plan Goal – (Court Involved) Case Plan	▪ From the Desktop menu option, select **Case Plan Goal** ▪ Create > Case work > Planning > Case Plan Goal > Family Name > Participant Name ▪ Click **Create.** ▪ If other Case Plan Goal pages have been created a pop-up page will display with all the Case Plan Goals currently created for the Case. ▪ Choose to either Copy an existing Case Plan Goal page or select the Create button to start a new Case Plan Goal page. ▪ Select the radio button for the desired Task and click **Create**. ▪ The Case Plan Goal page includes four tabs: Basic, TPR Considerations, Out of Home Care, and Independent Living. ▪ The page defaults to the Basic tab.	*A Case Plan Goal must be created for each child participant in the case.* *Once a Case Plan Goal is created for one child participant, a pop-up page will display when the user begins to create a Goal for the next child allowing the user to copy the Goal or to create a new Goal.* *If the user attempts to create a Goal without first creating a Task, the user will receive a validation message instructing them to first create a Task.* *There are three Status values for the Case Plan Goal:* ***Pending, Approved and Not Approved****.*
Basic Tab	▪ Select the Primary Goal for the child participant from the Primary Goal dropdown. ▪ Select the Concurrent Goal from	

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	the Concurrent Goal dropdown, if applicable. ▪ Answer each of the statements by selecting one of the following values: **Yes** or **No**. ▪ Enter supporting information in the required text fields. ▪ Enter a date in the header group box field: Expiration Date. ▪ Click the **Save** button.	
TPR Considerations Tab	▪ Select the TPR Considerations tab. ▪ Select the appropriate checkbox(es) and click the corresponding expando to enter supporting information. ▪ Click the **Save** button.	
Out of Home Care Tab	▪ Select the Out of Home Care tab. ▪ Select the appropriate radio button response for each statement. ▪ Enter text in the four text fields. ▪ Click the **Save** button.	*This tab addresses the child's placement.*
Independent Living Tab	▪ Select the Independent Living tab. ▪ Enter the appropriate information. ▪ Click the **Save** button. ▪ Click the **Completed** checkbox in the header groupbox.	*The tab would only be completed for children aged 13+.* *The Completed checkbox validates that all Case Plan Task tabs are completed. If any information is missing, the user will receive a Validation Message.*
Case Plan Word Template	▪ Return to the desktop & click on the Case Plan Task hyperlink. ▪ From the **Options** dropdown, select **Court Involved Case Plan** and click the **Go** button. ▪ Print the Case Plan Word document for required party's signatures. ▪ Click the **Close and Return to FSFN** button and the **Save** button, which will then save the document with the Case Plan.	*The Case Plan Goal(s) must be approved by supervisor before the case plan task can be sent to supervisor for approval. The Case Plan template must be launched prior to sending the Case Plan Tasks and Case Plan Goals for supervisory Review/Approval.* *The Court Involved Case Plan template pulls information from the Case Plan Task, Case Plan Goal, Medical/Mental Health, Education and Placement pages.*
Request Supervisory	▪ From the **Case Plan Task** page, **Options** drop down, select	*FSFN sends an automated message to the supervisor requesting review.*

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Review	Approval and click the **Go** button. ▪ Verify the correct Supervisor for Case Plan review is displayed. ▪ To change the Supervisor, select the Search hyperlink to search for and add the Supervisor. ▪ Click Continue. ▪ Click the **Save** and **Close** buttons. ▪ From the **Case Plan Goal** page, **Options** drop down, select Approval and click the **Go** button. ▪ Verify the correct Supervisor for Safety Plan review is displayed. ▪ To change the Supervisor, select the Search hyperlink to search for and add the Supervisor. ▪ Click Continue. ▪ Click the **Save** and **Close** buttons.	*Prior to Approval the plan status is Pending.* *After Approval the plan status is Approved.*
Create Case Plan Task – Voluntary Case Plan	▪ Repeat the steps above for completing the Case Plan Task page.	*The Voluntary Services Case Plan (VPS) pulls information from the Case Plan Task page only.*
Case Plan Word Template	▪ From the Case Plan Task page, click the **Options** dropdown, select **Voluntary Services Case Plan** and click the **Go** button. ▪ Print the Case Plan Word document for required party's signatures. ▪ Click the **Close and Return to FSFN** button and the **Save** button, which will then save the document with the Case Plan.	*The Case Plan template must be launched prior to sending the Case Plan for supervisory Review/Approval.*
Request Supervisory Review	▪ From the **Case Plan Task** page, **Options** drop down, select Approval and click the **Go** button. ▪ Verify the correct Supervisor for Case Plan review is displayed. ▪ To change the Supervisor, select the Search hyperlink to search for and add the Supervisor. ▪ Click Continue. ▪ Click the **Save** and **Close** buttons.	*FSFN sends an automated message to supervisor requesting review.* *Prior to Approval the plan status is Pending.* *After Approval the plan status is Approved.*
Create Judicial Review/Task Evaluation	▪ From the Desktop, click on Create > Casework > Planning > Judicial Review/Task Evaluation > Family Name > **Create**. ▪ The Case Plan Copy pop-up page displays to allow the user to	*The JR/Task Evaluation and JR/Goal Evaluation combined create the Judicial Review Social Study Report (JRSSR).* *The JR/Task Evaluation is completed on the family.*

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	select which case plan task is needed for evaluation. ▪ Click the **<u>Copy</u>** hyperlink next to the desired Case Plan Task. ▪ The Judicial Review/Task Evaluation page displays. ▪ There are five tabs on this page. The page defaults to the Outcomes tab.	*There can be multiple JR/Task Evaluations linked to a single Case Plan Task.* *If a user attempts to create the JR/Task Evaluation page prior to creating a Case Plan Task, a validation message will be generated. There must be an approved Case Plan Task.* *There are five tabs on this page; Outcomes, Resources and Barriers, Family Interaction, Recommendation, and Attachments.*
Outcomes Tab	▪ Enter supporting information in the required text field. ▪ Click the **<u>Progress</u>** hyperlink next to each Need displayed to launch the Progress Made pop-up page. ▪ On the Progress Made pop-up page, document the Task Compliance and Service Delivery for each Desired Measurable Behavioral Outcome row. ▪ Enter supporting information in the required text field ▪ Select the appropriate radio button response below the text field to indicate the level of progress being made. ▪ Click the **Save** button, then the **Close** button.	*This tab is used to measure and document progress toward the achievement of each Desired Measurable Behavioral Outcome and associated specific task captured in the Case Plan Task.*
Resources and Barriers Tab	▪ Select the Resources and Barriers tab. ▪ Enter supporting information in the four text fields on this tab. ▪ Click the **Save** button.	*This tab is used to document resource availability and barriers to achieving desired outcomes.*
Family Interaction Tab	▪ Select the Family Interaction tab. ▪ Enter supporting information in the two text fields in the first groupbox. ▪ Respond to the statement in the second groupbox by selecting the appropriate radio button: **Yes** or **No**. ▪ If **Yes** is selected, the text field below the statement becomes enabled and required. Enter supporting information.	*This tab is used to document issues concerning the Visitation Plan and Household Barriers.*

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	▪ Click the **Save** button.	
Recommendation Tab	▪ Select the Recommendation tab. ▪ Enter supporting information in the two text fields in the first groupbox on the tab. ▪ Select dropdown value to indicate Overall Compliance on each participant displayed. ▪ Enter supporting information in the last text field on the tab. ▪ Click the **Save** button.	*This tab is used to document reasonable efforts to finalize the permanency plan, discuss safety issues and make recommendations to the court.*
Attachments Tab	▪ Select the Attachments tab. ▪ Select any applicable checkboxes update the narrative, if applicable. ▪ Select the **Completed** checkbox in the header groupbox. ▪ Click the **Save** button.	*This tab is used to document the attachments to the Case Plan. The information documented on this screen when completing the Case Plan Task page will be carried over to this tab.* *The Completed checkbox validates that all Case Plan Task tabs are completed. If any information is missing, the user will receive a Validation Message.*
Judicial Review/Task Evaluation Word Template	▪ From the **Options** dropdown, select **Judicial Review/Task Evaluation** and click the **Go** button. ▪ Click the **Close and Return to FSFN** button and the **Save** button, which will then save the document with the Case Plan.	*The template must be launched prior to submitting for Supervisory Review/Approval.*
Create Judicial Review/Goal Evaluation	▪ From the Desktop, click on Create > Casework > Planning > Judicial Review/Goal Evaluation > Family Name > Participant Name > **Create**. ▪ The Judicial Review/ Goal Evaluation Copy pop-up page displays to allow the user to either copy an existing JR/ Goal Evaluation or create a new JR/ Goal Evaluation. ▪ Select the appropriate **<u>Copy</u>** hyperlink or click the **Create** button. ▪ The Case Plan Goal Select pop-up page displays to allow the user to select which case plan goal is needed for evaluation. ▪ Click the radio button next to the desired participant Case Plan Goal. ▪ The Judicial Review/Goal	*There are five tabs on the JR/Goal Evaluation page: Basic, Placement, Permanency Plan Information, Independent Living, and Recommendations.*

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	Evaluation page displays. ▪ There are five tabs on this page. The page defaults to the Basic tab. ▪ Enter an expiration date in the **Expiration Date** field in the header groupbox. ▪ Select the appropriate hearing type in the **Review Type** dropdown field.	*Review Type is a required field.*
Basic Tab	▪ Page defaults to the Basic tab. ▪ Enter the **Date of Hearing/Review** field in the first groupbox on the tab. ▪ Select the name of the Designated Tribal Contact, if applicable. ▪ Enter a name in the Legal Custodian text field, if applicable. ▪ Respond to the question in the third groupbox with the appropriate response. ▪ Enter supporting information in the following two text fields. ▪ Click the **Save** button.	*Date of Hearing/Review is a required field.* *The Parent names pre-populate from the child's Person Management record (Mother and Father – Birth) and Relationship tab on the Maintain Case page (Father – Legal).*
Placement Tab	▪ Select the Placement tab. ▪ Select the appropriate radio button responses to the 7 questions on the tab. ▪ Enter supporting information in the four text fields on the tab. ▪ Click the **Save** button.	
Permanency Plan Information	▪ Select the Permanency Plan Information tab. ▪ Enter/update the dates in the four date fields on the tab, if applicable. ▪ Select/update the goals from the two dropdown fields. ▪ Select the four checkboxes, if applicable. ▪ Enter supporting information in the four associated text fields, if applicable. ▪ Click the **Save** button.	*Selecting the checkbox enables the corresponding text field.*
Independent Living Tab	▪ Select the Independent Living tab. ▪ If the child is not yet 13 years of age and in licensed foster care, select the first checkbox on the tab.	*If the first checkbox is selected, the rest of the tab becomes disabled.*

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	▪ If the child is 13+ years of age and in licensed foster care, select the second checkbox on the tab and enter the **Date Referred** field. ▪ If child meets criteria for Independent Living, complete the other fields on the tab. ▪ Click the **Save** button.	
Recommendations Tab	▪ Select the Recommendations tab. ▪ Click each of the four expandos and enter supporting information in the corresponding text fields. ▪ Respond to the four questions by selecting the appropriate radio button and enter supporting information in the two text fields. ▪ Click the **Save** button.	*Selecting No to the statement: "Is the child between ages of 3 to 6 years and under the supervision of the Dept?" will disable the remaining statements in the Rilya Wilson Act Compliance groupbox.*
Judicial Review/Goal Evaluation Word Template	▪ From the **Options** dropdown, select **Judicial Review/Goal Evaluation** and click the **Go** button. ▪ Click the **Close and Return to FSFN** button and the **Save** button, which will then save the document with the Case Plan.	*The Judicial Review/Goal Evaluation must be approved by the supervisor before the Judicial Review/Task Evaluation can be submitted to the supervisor for approval.The template must be launched prior to submitting for Supervisory Review/Approval.*
Request Supervisory Review	▪ From the **Judicial Review/Goal Evaluation** page, **Options** drop down, select Approval and click the **Go** button. ▪ Verify the correct Supervisor for Case Plan review is displayed. ▪ To change the Supervisor, select the <u>Search</u> hyperlink to search for and add the Supervisor. ▪ Click Continue. ▪ Click the **Save** and **Close** buttons.	*FSFN sends an automated message to supervisor requesting review.* *Prior to Approval the plan status is Pending.* *After Approval the plan status is Approved.*