

QUICK START GUIDE FOR LINKING CASE SERVICES TO CASE PLAN CONCERNS, LINKING AND UNLINKING VISITATION PLANS AND RECORDING AND COPYING PLACEMENT AND SETTING INFORMATION

LINKING CASE SERVICES TO CASE PLAN CONCERNS

Navigate to the case

1. Click the Case Plan link in the navigation menu
2. Click the edit link next to the "In Progress" Case Plan
3. Click the Strengths and Concerns link
4. Click the Concerns tab
5. Click the Services Link
6. Click the Link Services Button
7. Check the case service(s) to be linked to the concern and select OK (If no services appear, case services will need to be entered for the case plan participants)
8. Selected case services are now linked to the case plan concern
9. If you have linked a service and you do not want linked to the case plan concern, click the unlink link
10. Now click the OK button
11. The case service is no longer linked. Click the Save button
12. You will need to repeat the above listed steps for each case plan concern

LINKING AND UNLINKING VISITATION PLANS TO THE CASE PLAN

Navigate to the Case

Linking Visitation Plans to the Case Plan

1. Click the Case Plan link in the navigation menu
2. Click the edit link next to the "In Progress" Case Plan
3. Click the Placement Visitation link
4. Click the Link Visitation Button
5. Check the box next to the Visitation Plan(s) to be linked to the Case Plan and

click the OK button (If no Visitation Plans are available, select the Add Visitation Plan button and complete a Visitation Plan)

6. Click the Save button, selected Visitation Plan is now linked to the Case Plan

Unlinking Visitation Plans to the Case Plan

1. Click the Case Plan link in the navigation menu
2. Click the edit link next to the "In Progress" Case Plan (you must amend the case plan in which you are going to unlink the visitation plan prior to completing step #2)
3. Click the Placement Visitation link
4. Click the Edit Link
5. Click the Edit Link next to the person name for the visitation information
6. Enter the end date and click the OK button
7. If all of the child(ren) linked to the Visitation Plan are being end-dated, enter a date in the Expiration Date Field. Click the Save button
8. If the child(ren) have been end-dated and the Visitation Plan expired, you can unlink the Visitation Plan by clicking the Unlink link
9. Click the Save button
10. Visitation Plan is no longer linked to the Case Plan

RECORDING AND COPYING PLACEMENT AND SETTING INFORMATION IN THE CASE PLAN

Navigate to the Case

1. Click the Case Plan link in the navigation menu
2. Click the edit link next to the "In Progress" Case Plan

3. Click the Placement Information link
4. The Placement Information link defaults to Settings.
5. Click the Edit link next to the topic for the child
6. Enter the narrative details for the topic. If there is more than one child, you have the ability to check the box next to the child(ren) name under Apply to Other Children and click the Save button.
7. The information will be copied to each child selected.
8. Information is now saved for both children. (Remember, each individual child still needs to have a unique response. This can be completed by selecting edit next to the topic and editing the information as necessary). Complete each topic by clicking the edit link and following the steps in #5. When all topics are completed, click the Placement Tab
9. Click the Edit link next to the topic for the child
10. Enter the narrative details for the topic. If there is more than one child, you have the ability to check the box next to the child(ren) name under Apply to Other Children and click the Save button.
11. Information is now saved for both children. (Remember, each individual child still needs to have a unique response. This can be completed by selecting edit next to the topic and editing the information as necessary). Complete each topic by clicking the edit link and following the steps in #10. When all topics are completed, click Close Button