

LINKING AND UNLINKING VISITATION PLANS TO CASE PLANS

Linking Visitation Plan(s) to the Case Plan

Navigate to the case

1. Click the Case Plan link in the navigation menu

The screenshot shows a web application interface. On the left is a navigation menu with links: [Legal Custody/Status](#), [Living Arrangement](#), [Initial Removal](#), [Placement Request](#), [Placement](#), [Visitation Plans](#), [Independent Living](#), [AR Family Service Plan](#), [AR Family Service Review](#), [Case Plan](#) (circled in red), and [Case Review/SAR](#). The main content area has a table with headers 'Worker Name' and 'Role'. Below this is a section titled 'Eligibility Assignment Information' with a table header 'Person Name' and 'Eligibility Specialist(s)', containing the text 'No Assignment Information Found'. A 'Close' button is at the bottom left of the main content area.

Worker Name	Role
Training01, User	Case Reviewer , Court Worker , Worker , Primary Worker , PlacementWorker

Eligibility Assignment Information

Person Name	Eligibility Specialist(s)
No Assignment Information Found	

Close

2. Click the Edit link next to the Case Plan "In progress"

The screenshot shows a 'Case Plans' section with a table. Above the table, it says 'Result(s) 1 to 2 of 2' and 'Page 1 of 1'. The table has columns: Type, Plan, Status, Approved Date, File Date, and Agency. The first row is 'Initial' (Type), '2.00' (Plan), 'In progress' (Status), with 'IHS Training' (Agency). The 'edit' link for this row is circled in red. The second row is 'Amended' (Type), '1.01' (Plan), 'Approved' (Status), with '05/22/2014' (Approved Date) and 'IHS Training' (Agency). Below the table are links: 'view', 'copy', 'reports', 'amend plan', and 'history'. An 'Add Case Plan' button is at the bottom left.

Type	Plan	Status	Approved Date	File Date	Agency
Initial	2.00	In progress			IHS Training
Amended	1.01	Approved	05/22/2014		IHS Training

edit, copy, reports, view, amend plan, history

Add Case Plan

3. Click the Placement Visitation Link

Topic	
Identifying Information	Provided
Strengths and Concerns	1 Strength(s) / 1 Concern(s) Records Entered
Placement Information	Not Provided
Placement Visitation	0 Visitation Plan(s) Linked
Caregiver Services	0 Service(s) Linked
Exceptions Information	Not Provided
Independent Living Information	Provided
Amendment Information	Provided
Court/Signature Details	0 Signature(s) Provided
Family Participation	Not Provided

4. Click the Link Visitation button

Visitation(s)

[Link Visitation](#)

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)

Visitation Plans

Result(s) 1 to 1 of 1 Page 1 of 1

	Child Name	Effective Date	Expiration Date	Status	Agency
<input type="checkbox"/>	Starfish, Patrick	05/01/2014		Completed	IHS Training

[Add Visitation Plan](#)

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

Visitation(s)

	Child Name	Effective Date	Expiration Date	Status	Agency	
edit unlink	Starfish, Patrick	05/01/2014		Completed	IHS Training	activity
Link Visitation						

[Apply](#) [Save](#) [Cancel](#)

Un-linking Visitation Plan(s) to the Case Plan

1. Click the Case Plan link in the navigation menu

[Legal Custody/Status](#)
[Living Arrangement](#)
[Initial Removal](#)
[Placement Request](#)
[Placement](#)
[Visitation Plans](#)
[Independent Living](#)
[AR Family Service Plan](#)
[AR Family Service Review](#)
[Case Plan](#)
[Case Review/SAR](#)

Worker Name	Role	
Training01, User	Case Reviewer , Court Worker , Worker , Primary Worker , PlacementWorker	IHS Tra

Eligibility Assignment Information

Person Name	Eligibility Specialist(s)
No Assignment Information Found	

[Close](#)

2. Click the Edit link next to the Case Plan In progress (you must amend the case plan in which you are going to unlink the visitation plan prior to completing step #2)

Case Plans

Result(s) 1 to 3 of 3

Page 1 of 1

	Type	Plan	Status	Approved Date	File Date	Agency	
edit copy reports	Initial	2.00	In progress			IHS Training	delete
edit copy reports	Amended	1.02	In progress			IHS Training	delete
view copy reports history	Amended	1.01	Approved	05/22/2014		IHS Training	

3. Click the Placement Visitation Link

Case Plan Topics			
Case Plan Type:	Amended	Plan Number:	1.02
	Status:	In progress	
Topic	Status		
Identifying Information	Provided		
Strengths and Concerns	1 Strength(s) / 2 Concern(s) Records Entered		
Placement Information	Not Provided		
Placement Visitation	1 Visitation Plan(s) Linked		
Caregiver Services	1 Service(s) Linked		
Exceptions Information	Provided		
Independent Living Information	Provided		
Amendment Information	Provided		
Court/Signature Details	0 Signature(s) Provided		
Family Participation	Not Provided		

4. Click the edit link

Visitation(s)

	Child Name	Effective Date	Expiration Date	Status
edit	Squirrel, Sandy	04/21/2014		Linked to Case Plan

[Link Visitation](#)

[Apply](#) [Save](#) [Cancel](#)

5. Click the edit link

	Name	Frequency	Duration	Location	Restricted Visit	Supervised Visit	Effective Date	End Date	
COPY EDIT	Bob, Sponge	2 times weekly	2 hours	Agency Setting	Yes	Yes	05/21/2014		delete

6. Enter the End Date and click the OK button

Case ID: 2646016 Case Name: Bob, Sponge Case Status: Open (04/07/2014) Case Category: Ongoing

Visitation Information Details

Effective Date: * 05/21/2014 End Date: *

Member Who May Visit: * Bob, Sponge - 10/26/1969

Non-Case Member Who May Visit:

How Often: * 2 times weekly

Where: * Agency Setting

Restricted Visit: ☒ Yes ☐ No

How Long (Duration): * 2 hours

Other Location Information:

Supervised Visit: ☒ Yes ☐ No

State the restriction on visitation and/or supervision. Explain the reasons for any restrictions on the location, frequency, and duration of visitation and/or the need for supervised visitation:
narrative for training purposes

Spell Check Clear 1000

Other Approved Communication: *

narrative for training purposes

Spell Check Clear 1000

OK Cancel

7. If all of the child(ren) linked to this Visitation Plan are being end dated, enter a date in the Expiration Date Field. Click the Save button

Visitation Plans Details

Agency: IHS Training

Child Name: * Squirrel, Sandy - 10/22/2003

Effective Date: * 04/21/2014 Expiration Date: *

Name	Frequency	Duration	Location	Restricted Visit	Supervised Visit	Effective Date	End Date
visit Bob, Sponge	2 times weekly	2 hours	Agency Setting	Yes	Yes	04/21/2014	04/23/2014

Add Visitation Information

Sibling Information

☐ N/A- All siblings are placed together

☐ One or more siblings are not included on the visitation plan because ongoing visitation or interaction with the identified sibling(s) would be contrary to the safety and well-being of the other child(ren).

Sibling(s) Included on Visitation Plan:

Sibling(s) Not Included:

Explain:

Spell Check Clear 1000

☒ All children not identified above are included in the visitation plan.

Describe efforts to place the children together, and why those efforts were not successful:

Spell Check Clear 1000

Status: * Linked to Case Plan

Apply Save Cancel

8. If all child(ren) have been end-dated and the Visitation Plan expired, you can unlink the Visitation Plan from the Case Plan by clicking the Unlink link

Visitation(s)				
	Child Name	Effective Date	Expiration Date	Status
edit unlink	Squirrel, Sandy	04/21/2014		Linked to Case Plan

9. Click the Save button

Visitation(s)			
Link Visitation			
Apply	Save	Cancel	

10. Visitation Plan is no longer linked to the Case Plan

Visitation(s)			
Link Visitation			
Apply	Save	Cancel	

11. No Visitation is linked to the Case Plan

Topic	Status
Identifying Information	Provided
Strengths and Concerns	1 Strength(s) / 1 Concern(s) Records Entered
Placement Information	Provided
Placement Visitation	0 Visitation Plan(s) Linked
Caregiver Services	1 Service(s) Linked
Exceptions Information	Provided
Independent Living Information	Provided
Amendment Information	Provided
Court/Signature Details	0 Signature(s) Provided
Family Participation	Not Provided