

## **RECORDING PLACEMENT AND SETTING INFORMATION IN THE CASE PLAN**

Navigate to the case

1. **Click the Case Plan link in the navigation menu**

The screenshot shows a navigation menu on the left 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 displays 'Eligibility Assignment Information' with a table showing 'Worker Name' (Training01, User) and 'Role' (Case Reviewer, Court Worker, Worker, Primary Worker, PlacementWorker). Below this, another table shows 'Person Name' and 'Eligibility Specialist(s)', with the text 'No Assignment Information Found'. A 'Close' button is visible at the bottom left of the main content area.

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

The screenshot shows a table titled 'Case Plans' with the following columns: Type, Plan, Status, Approved Date, File Date, Agency, and a delete link. The table contains two rows. The first row is 'Initial' (Plan 2.00, Status 'In progress', Agency 'IHS Training') and has an 'edit' link circled in red. The second row is 'Amended' (Plan 1.01, Status 'Approved', Approved Date '05/22/2014', Agency 'IHS Training') and has a 'view' link. Below the table are links for 'copy', 'reports', 'amend plan', and 'history'.

Type	Plan	Status	Approved Date	File Date	Agency	
Initial	2.00	In progress			IHS Training	<a href="#">edit</a> <a href="#">delete</a>
Amended	1.01	Approved	05/22/2014		IHS Training	<a href="#">view</a> <a href="#">copy</a> <a href="#">reports</a> <a href="#">amend plan</a> <a href="#">history</a>

3. **Click the Placement Information Link**

The screenshot shows a table with two columns: 'Topic' and 'Status'. The 'Placement Information' link is circled in red. The table lists various topics and their corresponding status.

Topic	Status
Identifying Information	Provided
Strengths and Concerns	1 Strength(s) / 1 Concern(s) Records Entered
<b>Placement Information</b>	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. The Placement Information link defaults to Settings. Click the Edit link next to the topic for the child

Settings Placement

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

Settings Details

Case Plan Type: Initial Plan Number: 2.00 Status: In progress

Narrative Topic/Response	
Squirrel, Sandy - 10/22/2003	JFS01443 Med/Ed Form: Not Generated
<a href="#">edit</a>	Own Home
<a href="#">edit</a>	Certified/Approved Relative -CAR
<a href="#">edit</a>	Certified Approved Non Relative
<a href="#">edit</a>	Other
Starfish, Patrick - 01/01/2008	JFS01443 Med/Ed Form: Not Generated
<a href="#">edit</a>	Own Home
<a href="#">edit</a>	Certified/Approved Relative -CAR
<a href="#">edit</a>	Certified Approved Non Relative
<a href="#">edit</a>	Other

Close

5. Enter 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. The information will then be copied to each child selected

Narrative Details

Child Name: Squirrel, Sandy Person ID: 9064068

Topic: Own Home

Describe: \*

Spell Check Clear 2000

Apply to Other Children

	Case Plan Participant - DOB
<input type="checkbox"/>	Starfish, Patrick - 01/01/2008

Apply Save Cancel

6. 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

Settings

Placement

Case ID: 2546016  
Case Name: Bob, Sponge

Case Status: Open ( 04/07/2014 )  
Case Category: Ongoing

Settings Details

Case Plan Type: Initial

Plan Number: 2.00

Status: In progress

Narrative Topic/Response

Squirrel, Sandy - 10/22/2003

JFS01443 Med/Ed Form: Not Generated

edit

Own Home

narrative for training purposes

edit

Certified/ Approved Relative -CAR

edit

Certified Approved Non Relative

edit

Other

Starfish, Patrick - 01/01/2008

JFS01443 Med/Ed Form: Not Generated

edit

Own Home

narrative for training purposes

edit

Certified/ Approved Relative -CAR

edit

Certified Approved Non Relative

edit

Other

Close

7. Click the Edit link next to the topic for the child

Placement Details	
Case Plan Type:	Initial
Plan Number:	2.00
Status:	In progress
Narrative Topic/Response	
Squirrel, Sandy - 10/22/2003	
<a href="#">edit</a>	How was it determined this was a safe and appropriate environment for the child?
<a href="#">edit</a>	How will the placement meet the best interest of the child?
<a href="#">edit</a>	How will the placement meet the Case Plan Goals of the Child?
<a href="#">edit</a>	How will the placement meet the special needs of the child?
<a href="#">edit</a>	What is the proximity of the placement to the parent, guardian, custodian? What transportation problems might create obstacles to visitation? How will the agency resolve these obstacles?
<a href="#">edit</a>	When selecting a substitute care placement setting, describe how the agency considered proximity to the school in which the child was enrolled prior to placement.
<a href="#">edit</a>	Is this an out-of-state placement?
	Response: No
Starfish, Patrick - 01/01/2008	
<a href="#">edit</a>	How was it determined this was a safe and appropriate environment for the child?
<a href="#">edit</a>	How will the placement meet the best interest of the child?
<a href="#">edit</a>	How will the placement meet the Case Plan Goals of the Child?
<a href="#">edit</a>	How will the placement meet the special needs of the child?
<a href="#">edit</a>	What is the proximity of the placement to the parent, guardian, custodian? What transportation problems might create obstacles to visitation? How will the agency resolve these obstacles?
<a href="#">edit</a>	When selecting a substitute care placement setting, describe how the agency considered proximity to the school in which the child was enrolled prior to placement.
<a href="#">edit</a>	Is this an out-of-state placement?
	Response: No

8. Enter Narrative Details for the topic. If there is more than one child and the narrative details are the same, check the box next to the child(ren) name under Apply to Other Children and click the Save button

Narrative Details

Child Name: Squirrel, Sandy Person ID: 9064068 DOB: 10/22/2003

Topic: How was it determined this was a safe and appropriate environment for the child?

Describe: \*

Spell Check Clear 2000

Apply to Other Children

	Case Plan Participant - DOB
<input type="checkbox"/>	Starfish, Patrick - 01/01/2008

Apply Save Cancel

9. 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 the Close button

Settings	Placement
Case ID: 2646016 Case Name: Bob, Sponge	Case Status: Open ( 04/07/2014 ) Case Category: Ongoing
Placement Details	
Case Plan Type: Initial	Plan Number: 2.00 Status: In progress
Narrative Topic/Response	
Squirrel, Sandy - 10/22/2003	
How was it determined this was a safe and appropriate environment for the child?	
<a href="#">edit</a>	narrative for training purposes
How will the placement meet the best interest of the child?	
<a href="#">edit</a>	
How will the placement meet the Case Plan Goals of the Child?	
<a href="#">edit</a>	
How will the placement meet the special needs of the child?	
<a href="#">edit</a>	
What is the proximity of the placement to the parent, guardian, custodian? What transportation problems might create obstacles to visitation? How will the agency resolve these obstacles?	
<a href="#">edit</a>	
When selecting a substitute care placement setting, describe how the agency considered proximity to the school in which the child was enrolled prior to placement.	
<a href="#">edit</a>	
Is this an out-of-state placement?	
<a href="#">edit</a>	Response: No
Starfish, Patrick - 01/01/2008	
<a href="#">edit</a>	How was it determined this was a safe and appropriate environment for the child?
	narrative for training purposes
<a href="#">edit</a>	How will the placement meet the best interest of the child?
<a href="#">edit</a>	How will the placement meet the Case Plan Goals of the Child?
<a href="#">edit</a>	How will the placement meet the special needs of the child?
<a href="#">edit</a>	What is the proximity of the placement to the parent, guardian, custodian? What transportation problems might create obstacles to visitation? How will the agency resolve these obstacles?
<a href="#">edit</a>	When selecting a substitute care placement setting, describe how the agency considered proximity to the school in which the child was enrolled prior to placement.
<a href="#">edit</a>	Is this an out-of-state placement?
	Response: No

Close