Completing a Family Case Plan

Knowledge Base Article

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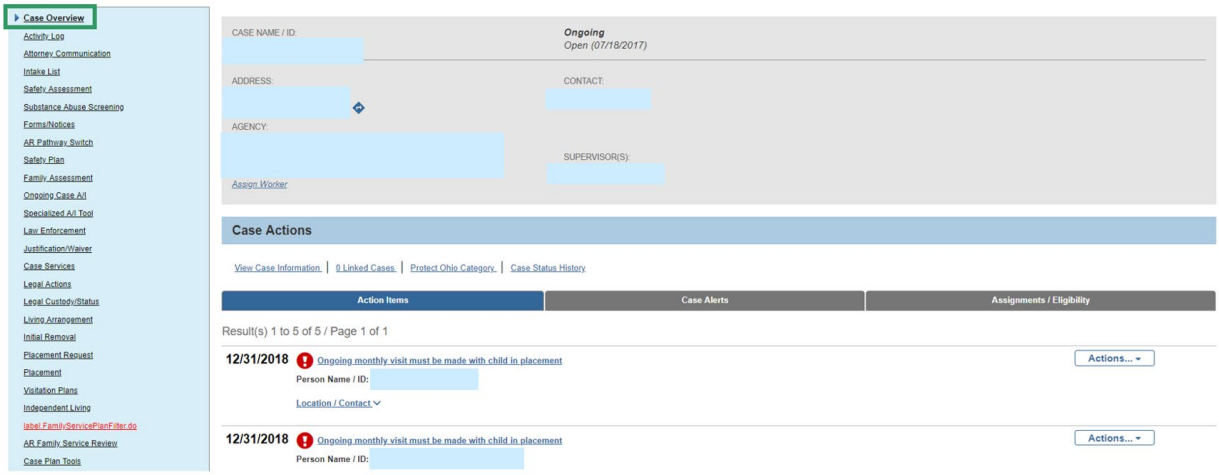
Overview

This article provides step-by-step instruction for completing a Family Case Plan (including an Adoption Family Case Plan).

Adding a Family Case Plan

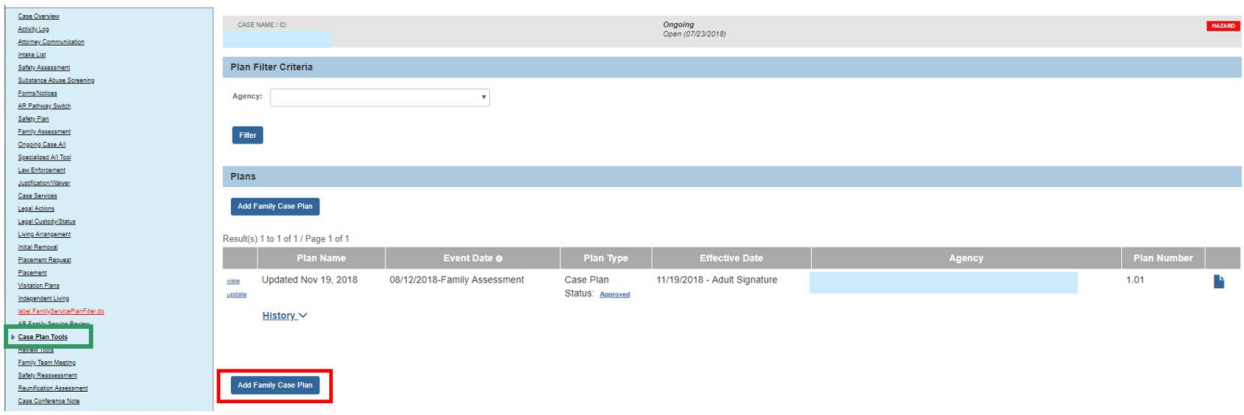
From the Ohio SACWIS home screen:

1. Navigate to the **Case Overview** screen.
2. Click, **Case Plan Tools** in the navigation pane.



The **Case Plan Tools** screen appears.

3. Click, **Add Family Case Plan**.



The **Parties to the Plan** screen appears.

> **Note**: Parties to the Plan is the first entry in the **Family Case Plan Topics** navigation pane displayed on the left side of the screen; the list of topics is dependent on the child's legal status and location of the child (placement setting, living arrangement, etc.).

Completing the Parties to the Plan Topic

Adding a Child to the Family Case Plan

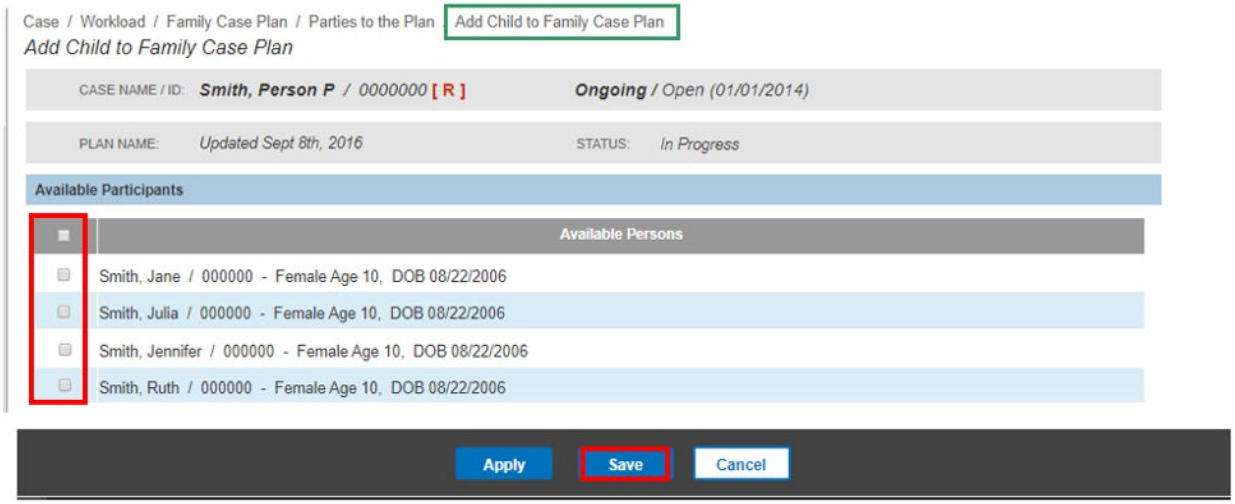
1. Click, **Add Child to Family Case Plan**.

   Note: If necessary, add narrative to the text box in the **Additional Information** grid, in response to: **If sufficient information is not available to complete any element of the Family Case Plan within 30 days, provide a justification explaining why it is not able to be completed and describe the steps taken to obtain the information.**

The **Add Child to Family Case Plan** screen appears.

2. In the **Available Participants** grid, place a checkmark in the check box(es) beside the name of the child(ren) you want to add to the plan.
3. Click, **Save**.

   Note: When creating an Initial Family Case Plan, the system will pull all Active child and adult participants from the most recent approved Family Assessment. If there is no approved Family Assessment within the current case episode, the system will not automatically display child and adult participants.
4. Make a selection from Court Case Number and/or Court ID Number (optional fields).
5. Make a selection from the Child's Permanency Goal drop-down menu, per child case plan participant.
6. If a child case plan participant is in a legal status of Temporary Custody (includes Temporary Order of Custody, Temporary Custody, Temporary Custody 1st Extension, Temporary Custody 2nd Extension), proceed to the Completing the Concurrent Plan section of this article. If not, skip to the Adding an Adult to the Family Case Plan section of this article.



The **Parties to the Plan** screen appears, displaying the added child.

Completing the Concurrent Plan

Important: Per Family Case Plan Rule 5101:2-38-05 that includes the Concurrent Planning requirements, effective 01/01/2023, all child plan participants with a legal status of Temporary Custody (includes Temporary Order of Custody, Temporary Custody, Temporary Custody 1st Extension, Temporary Custody 2nd Extension) AND whose **Child's Permanency Goal** is Return child(ren) to parent/guardian/custodian (Reunification), are required to have concurrent planning activities within the Family Case Plan to be compliant.

The **Concurrent Plan Objective** and the **Describe the planned efforts including services and activities to support concurrent planning and how support for the concurrent plan objective will be obtained** narrative will only display when these conditions are met, and they are required to approve the Family Case Plan.

Note: Children who are currently in agency Temporary Custody with a current Family Case Plan Permanency Goal of Reunification as of 01/01/2023, will be required to have an updated Family Case Plan that includes the Concurrent Plan information at their next scheduled Semiannual Administrative Review by 07/01/2023.

- A Family Case Plan update will need to be completed.
- Please refer to **Completing an Update to the Family Case Plan** section in this article.

Note: A Concurrent Plan serves a different purpose than a Recommended Family Case Plan, and therefore should not replace your business process for Recommended Family Case Plans when changes are being recommended to the court. For additional information on Concurrent Plan, refer to Rule 5101:2-38-05.

For each child plan participant, as applicable:

1. Make a selection from the **Concurrent Plan Objective** drop-down menu.
2. Enter narrative in the **Describe the planned efforts including services and activities to support concurrent planning and how support for the concurrent plan objective will be obtained** text field.

Completing a Family Case Plan

Case / Workload / Family Case Plan / Parties to the Plan

CASE NAME / ID: *Smith, Person P / 0000000 [R]* *Ongoing / Open (01/01/2014)*

PLAN NAME: *Updated / Sept 8th, 2016* STATUS: *In Progress*

Family Case Plan Topics

- Update Information (UI) — Completed
- Parties to the Plan (PP) — Completed
- Strengths and Needs (SN) — Not Completed
- Concerns (SC) — Not Completed
- Placement Information (PI) — Not Completed
- Non-Custodial Parent Info (NCP) — Not Completed
- Visitation (V) — Optional
- Foster Youth Rights Handbook (FH) — Completed
- Independent Living Information (IL) — Not Completed
- Exceptions to Permanent Custody (EPC) — Completed
- Permanency Information - PC (PC) — Completed
- Permanency Information - PPLA (PPLA) — Completed
- Candidate For Foster Care (FC) — Completed
- Court and Signatures (CS)
- Approval (A)

Child(ren) Participating in the Family Case Plan

Charlesworth- Dewitt, Jimmy Chainsaw / 0000000 Male Age 1, DOB 01/01/2016

Protected under ICWA: No

Child Location: Own Home

Agency Legal Status: Open Custody Episode, no Legal Status

Court Case Number: Select Item

Court ID Number: Select Item

Child's Permanency Goal:

Charlesworth- Dewitt, Janey Hacksaw / 0000000 Female Age 12, DOB 01/01/2005

Protected under ICWA: Yes, Burns Paiute Tribe

Child Location: Certified Foster Home

Agency Legal Status: Temporary Court Order

Court Case Number: Select Item

Court ID Number: Select Item

Child's Permanency Goal:

Concurrent Plan Objective:

Describe the planned efforts including services and activities to support concurrent planning and how support for the concurrent plan objective will be obtained:

ABC 10000

Add Child to Family Case Plan | Relationships

Adult(s) Participating in the Family Case Plan

Smith, John / 000000 Male Age 26, DOB 01/01/1990 Contact Information: (614) 555-5555

Smith, Jane / 000000 Female Age 26, DOB 01/01/1990 Contact Information: (614) 555-5555

Add Adult to Family Case Plan

Additional Information

If sufficient information is not available to complete any element of the Family Case Plan within 30 days, provide a justification explaining why it is not able to be completed and describe the steps taken to obtain the information.

Expand Full Screen

ABC 1000

Completing the KGAP Documentation

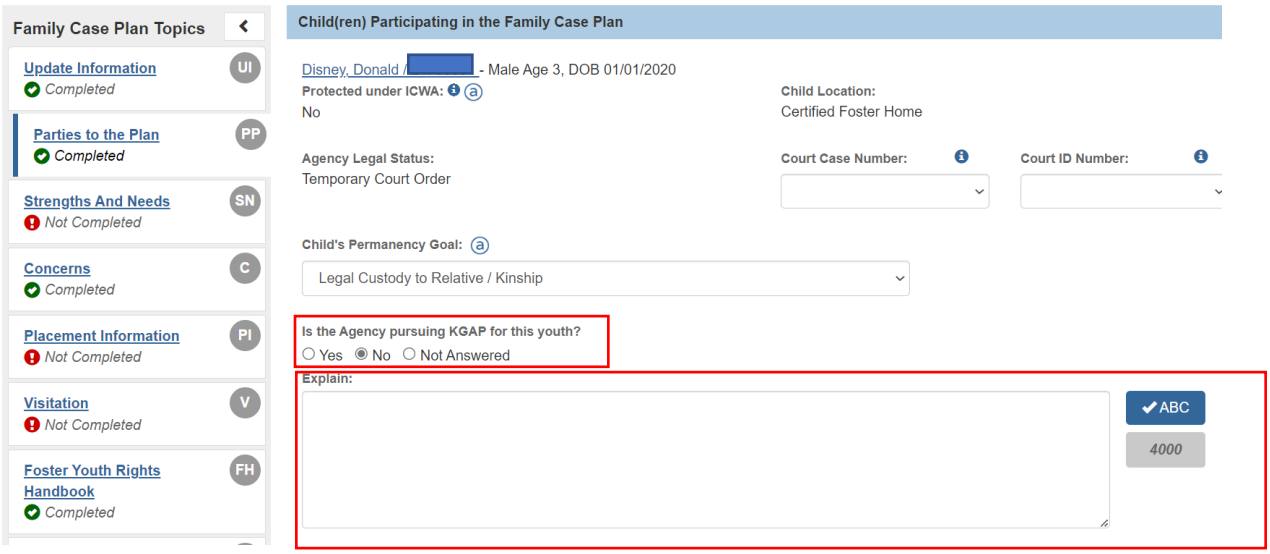
Important: Per Family Case Plan Rule 5101:2-38-05.02 that includes the requirements for the Kinship Guardianship Assistance Program (KGAP), all child plan participants currently in Agency Custody with a **Case Plan Goal** or a **Concurrent Plan Objective** of Legal Custody to Relative are required to have KGAP Documentation in the Family Case Plan.

Note: A Family Case Plan Update will be required for a child to be eligible for KGAP.

- A Family Case Plan update will need to be completed prior to the Family submitting their KGAP Application (Application Date) to be eligible.
- Please refer to **Completing a Kinship Guardianship Assistance Program (KGAP) Eligibility Record** section in this article.

For each child plan participant, as applicable:

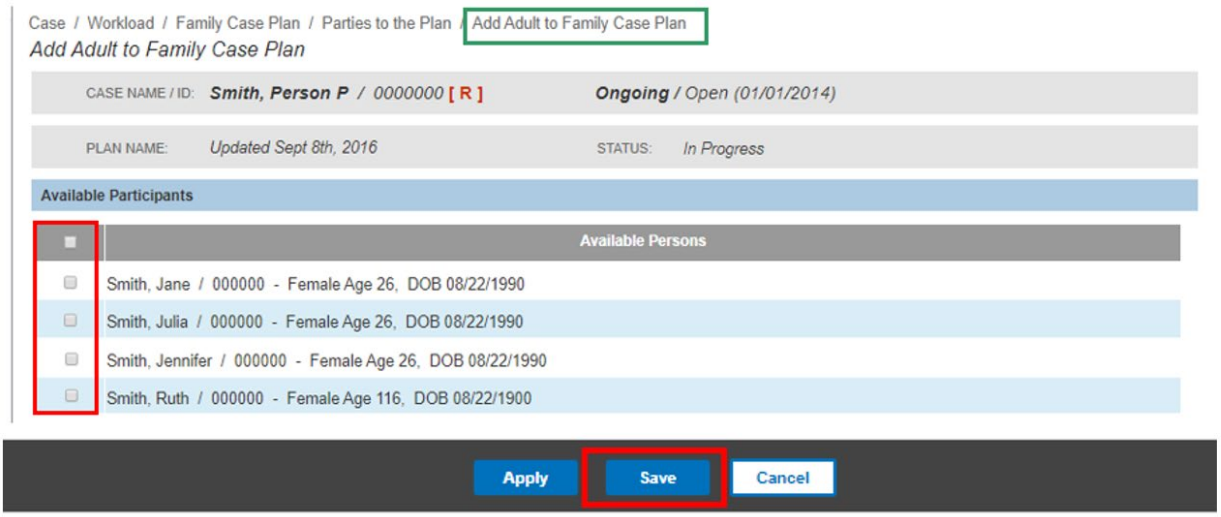
1. Make a selection from the **Is the Agency pursing KGAP for this youth?** radio button option.
2. Enter narrative in the **Explain** text field if a No response was selected. Otherwise, if a Yes is selected, the KGAP Information questions will display per child on the Placement Information Topic. Refer to steps in the *Placement Information* Section.



Adding an Adult to the Family Case Plan

The **Add Adult to Family Case Plan** screen appears.

1. Click, **Add Adult to Family Case Plan.**
2. In the **Available Participants** grid, make a selection(s) by placing a checkmark(s) in the check box(es) beside the name of the adult(s) you wish to add to the case plan.
3. Click, **Save**.

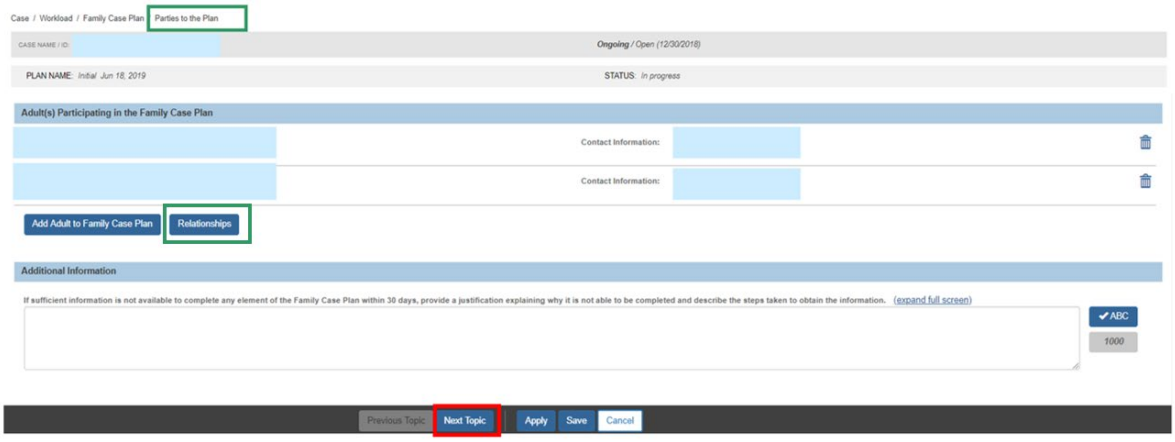


The **Parties to the Plan** screen appears, displaying the added adult(s) in the **Adult(s) Participating in the Family Case Plan** grid.

Note: Adults participating in the Family Case Plan will not appear on Adoption or Recommended for PC Family Case Plans.

If necessary, you can click the Relationships tab to view and/or edit the relationships among case memebers. For more information regarding Relationships, please see the following Knowledge Base Article: Managing Person-Level Relationships.

4. Click, **Next Topic**.



The **Strengths and Needs Assessment** screen appears.

Completing the Strengths and Needs Topic

1. Click the **Assessment Responses** drawer of each category (Child Functioning, Adult Functioning, Family Functioning, Historical Functioning) to display a list of Risk Contributors.

   Note: Within the Adoption Family Case Plan, the Adult Functioning, Family Functioning and Historical Functioning do not display.

2. The system will display all identified Risk Contributors and Non-Risk Contributors from the Current Family Case Plan in the Current Plan column. If there are any changes to Risk Contributors or Non-Risk Contributors since the last Strengths and Needs Assessment, click the toggle buttons in the Current Plan Column and then describe the changes in the narrative box.
3. If there are no changes made in the Current Plan column, click the checkbox under the corresponding Functioning Element 'No changes required within Child Functioning.'
4. When you have completed the Strength and Needs Assessment, click, **Next Topic**.

Completing a Family Case Plan

Case / Workload / Family Case Plan / Concerns / Risk Contributor Information

CASE NAME / ID: **Smith, Person P** / 0000000 [R] **Ongoing** / Open (01/01/2014)

PLAN NAME: Updated Sept 8th, 2016 STATUS: In Progress

Family Case Plan Topics

- Update Information (UI) — Completed
- Parties to the Plan (PP) — Completed
- Strengths and Needs (SN) — Not Completed
- Concerns (SC) — Not Completed
- Placement Information (PI) — Not Completed
- Visitation (V) — Optional
- Foster Youth Rights Handbook (FH) — Completed
- Independent Living Information (IL) — Not Completed
- Exceptions to Permanent Custody (EPC) — Completed
- Permanency Information - PC (PC) — Completed
- Permanency Information - PPLA (PPLA) — Completed
- Candidate For Foster Care (FC) — Completed
- Court and Signatures (CS)
- Approval (A)

Strengths and Needs Assessment

The ratings reflect the last assessment of the Family's Strength and Needs. If additional information has been identified that warrants a change of the Strength and Needs Assessment, make the changes to the Risk Contributors ratings and provide a rationale below. The updated information will be available for the development of your case plan concern.

Child Functioning — Not Completed

Assessment Responses

	Child Name	Previous Risks Family Assessment: 11/23/2000	Current Plan
Self Protection	Smith, Jane - Age 10		NON-RISK
	Smith, Maggie - Age 8	RISK	RISK
	Smith, Alexander - Age 5		NON-RISK
Physical /Cognitive /Social Development	Smith, Jane - Age 10		NON-RISK
	Smith, Maggie - Age 8		NON-RISK
	Smith, Alexander - Age 5	RISK	RISK
Emotional / Behavioral Functioning	Smith, Jane - Age 10		NON-RISK
	Smith, Maggie - Age 8		NON-RISK
	Smith, Alexander - Age 5		NON-RISK

No changes required within Child Functioning

Please describe reason for changes to Child Functioning:

Expand Full Screen

ABC

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Adult Functioning — Not Completed

Assessment Responses

Family Functioning — Not Completed

Assessment Responses

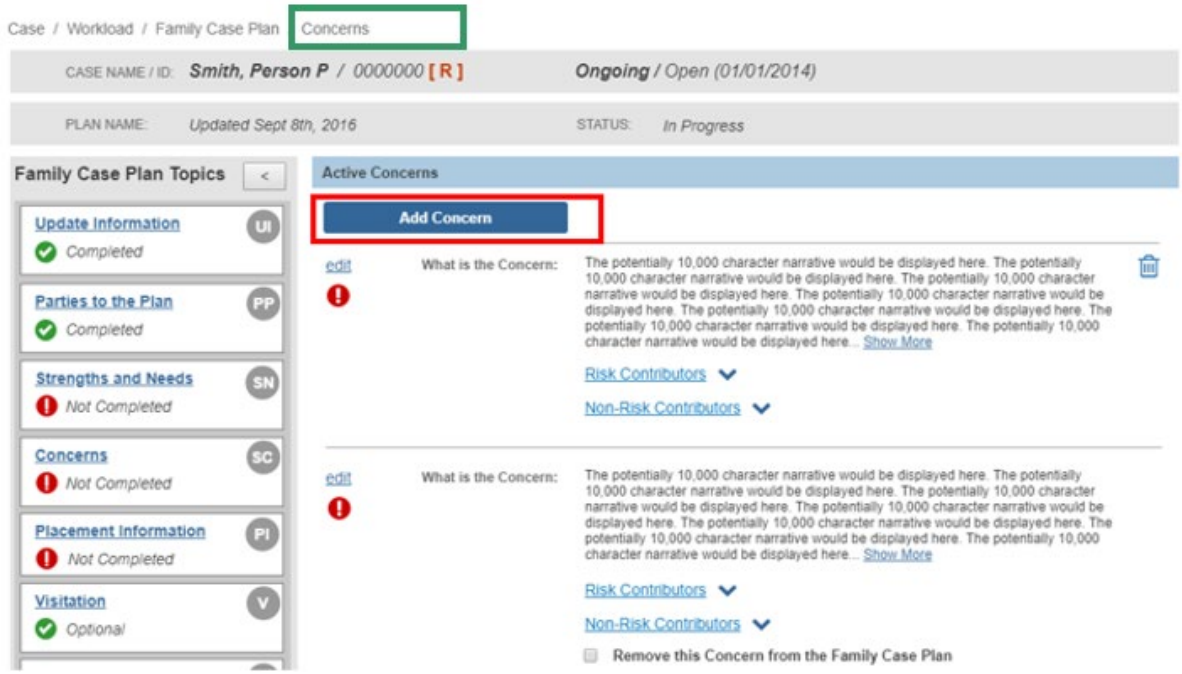
Historical Functioning — Not Completed

Assessment Responses

The **Concerns** screen appears.

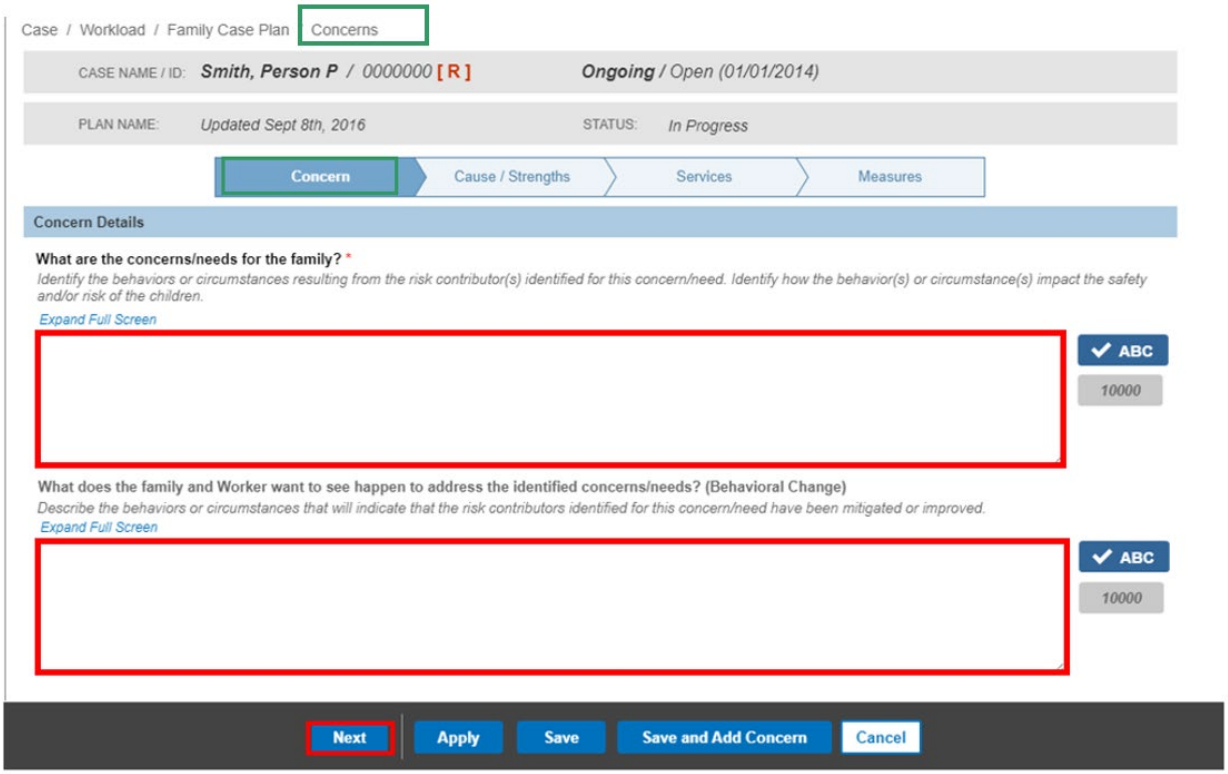
Completing the Concerns Topic

1. Click, **Add Concern**.



The **Concerns** screen appears, displaying the **Concern** tab page.

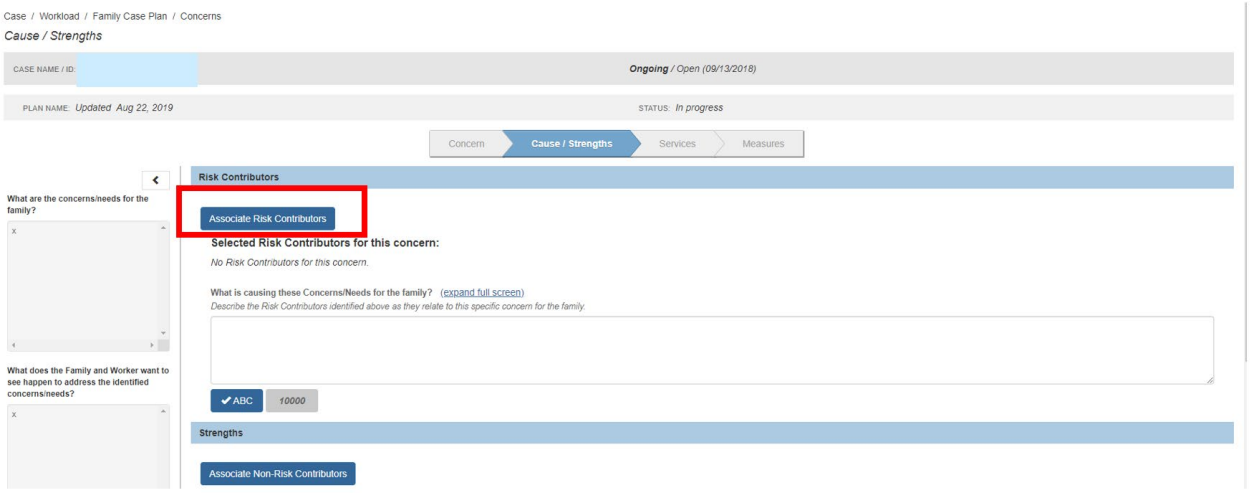
1. Enter narrative in the text box under, **What are the concerns/needs for the family?**
2. Enter narrative in the text box under, **What does the family and Worker want to see happen to address the identified concerns/needs? (Behavioral Change)**.
3. Click, **Next**.



The **Concerns** screen appears, displaying the **Cause/Strengths** tab page.

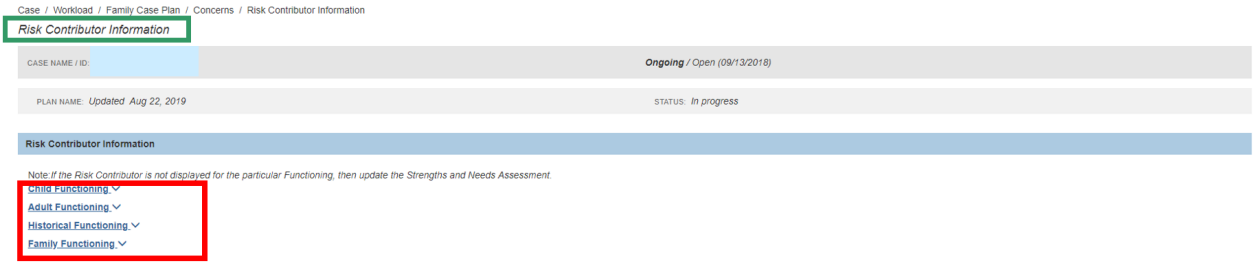
Completing the Cause/Strengths Tab Page

1. Click, **Associate Risk Contributors**.
2. Enter narrative in response to: **What is causing these Concerns/Needs for the family?**



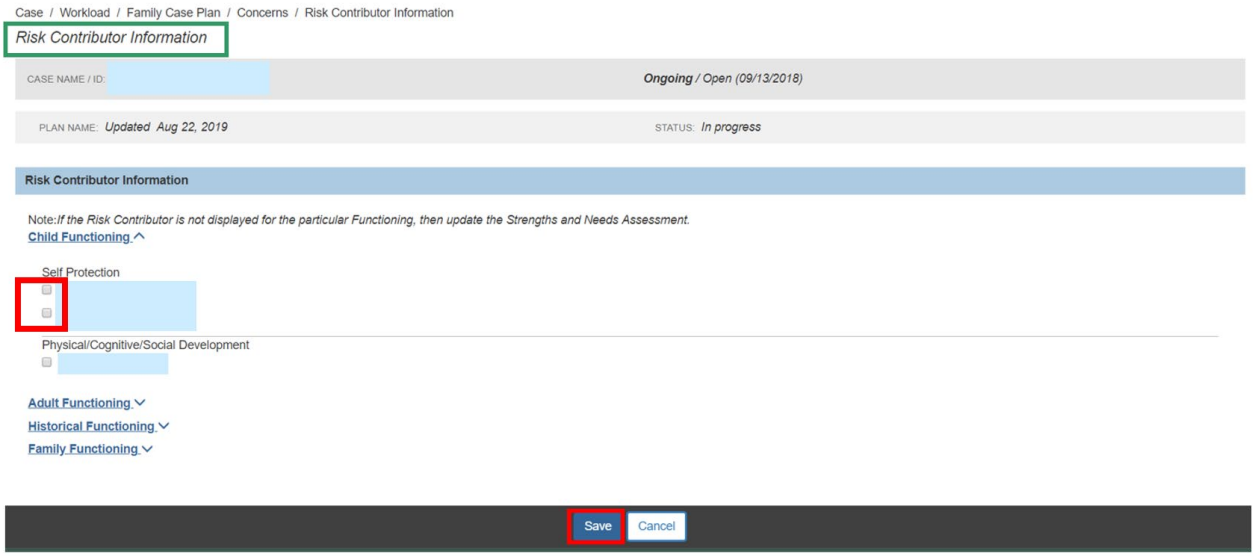
The **Risk Contributor Information** screen displays.

3. Click the relevant drawer(s) in the **Risk Contributor Information** grid.

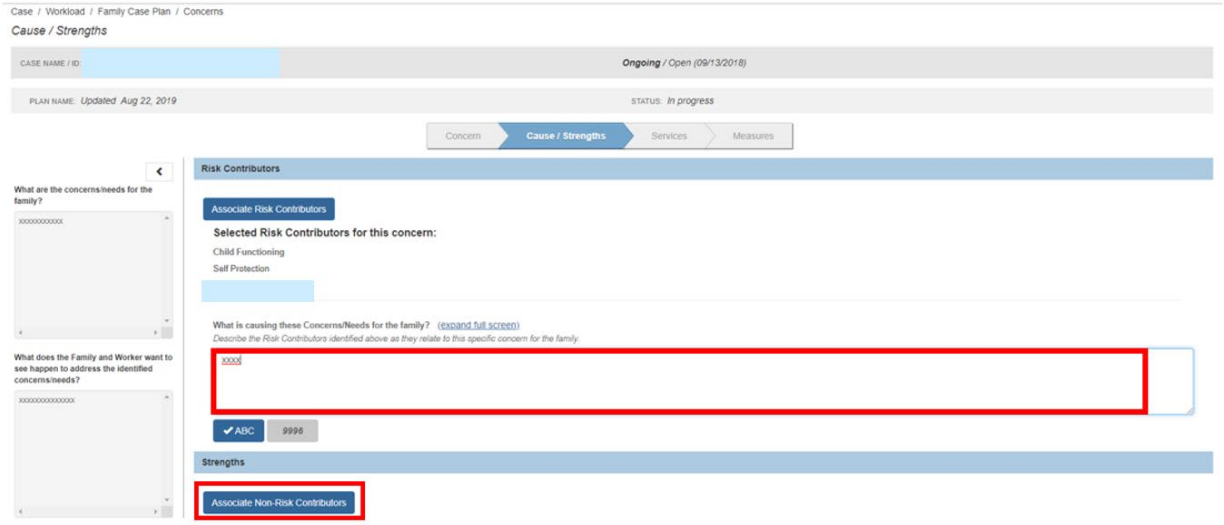


The drawer(s) will expand.

4. Place a checkmark(s) in the check box(es) of the applicable Risk Contributor.
5. Click, **Save**.

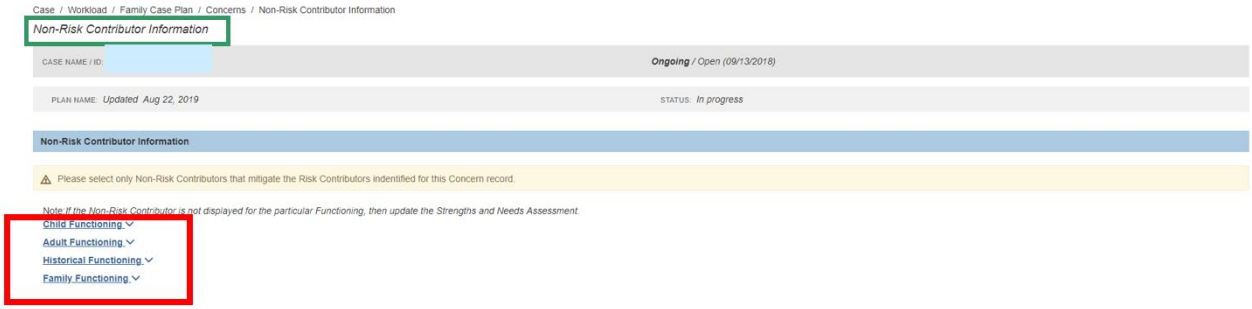


6. The Selected Risk Contributors for this concern will display. Enter narrative in response to: **What is causing these Concerns/Needs for the Family?**
7. Click, **Associate Non-Risk Contributors**.



The **Non-Risk Contributor Information** screen appears.

8. Click each Non-Risk Contributor drawer.



Each drawer will expand.

9. Select the Non-Risk Contributors associated to the Concern by placing a checkmark(s) in the check box(es).
10. Click, **Save**.

Non-Risk Contributor Information

Please select only Non-Risk Contributors that mitigate the Risk Contributors identified for this Strength and Concern record.

Note: *If the Non-Risk Contributor is not displayed for the particular Functioning then update the Strengths and Needs Assessment.*

Child Functioning

Emotional Functioning
- *Smith, Johnny - Age 10*
- *Smith, Johnny - Age 10*

Physical/Cognitive/Social Development
- *Smith, Johnny - Age 10*
- *Smith, Johnny - Age 10*

Self Protection
- *Smith, Johnny - Age 10*
- *Smith, Johnny - Age 10*

Adult Functioning

Parenting Practices
- *Smith, Jane - Age 30*
- *Smith, Jacob - Age 30*

Domestic Relations
- *Smith, Jane - Age 30*
- *Smith, Jacob - Age 30*

Substance Abuse
- *Smith, Jane - Age 30*
- *Smith, Jacob - Age 30*

Historical Functioning

Caretaker's Victimization of Other Children
- *Smith, Jane - Age 30*
- *Smith, Jacob - Age 30*

Caretaker's Abuse / Neglect as a Child
- *Smith, Jane - Age 30*
- *Smith, Jacob - Age 30*

Family Functioning
- Extended Family, Social and Community Connectedness

Save | Cancel

The Selected Non-Risk Contributors for this concern will display. Enter narrative in response to: **What strengths and family/community supports does the family have?**

Strengths

Associate Non-Risk Contributors

Non-Risk Contributors Selected as Strengths:

Child Functioning

Emotional Functioning

Smith, Jimmy - Age 10

Physical/Cognitive/Social Development

Smith, Johnny - Age 10

Adult Functioning

Domestic Relations

Smith, Jane - Age 30, Smith, Jacob - Age 30

Historical Functioning

Caretaker's Victimization of Other Children

Smith, Jane - Age 30

Caretaker's Abuse / Neglect as a Child

Smith, Jacob - Age 30

Family Functioning

Family Roles, Interactions and Relationships
Resource Management and Household Maintenance
Extended Family, Social, and Community Supports

What strengths and family/community supports does the family have?

Describe the Non-Risk Contributors identified above and how they mitigate the Risk Contributors for this concern.

Expand Full Screen

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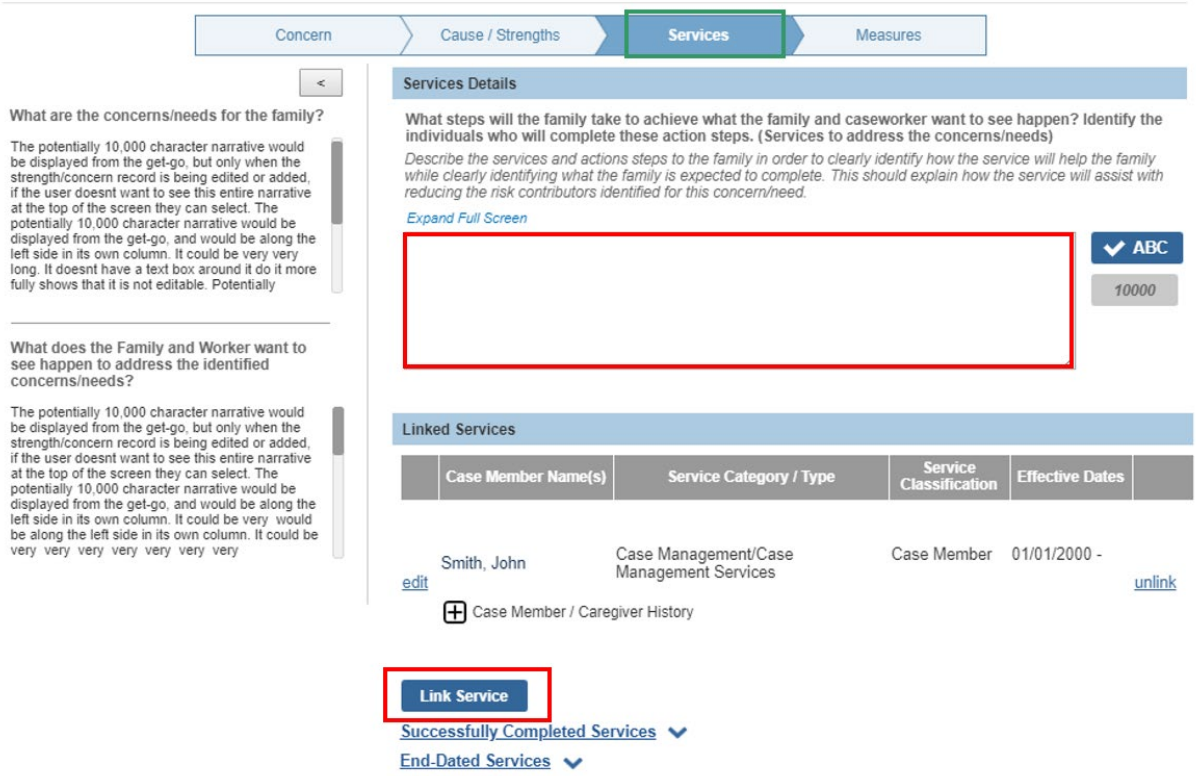
11. Click, **Next or Services tab**.

The **Services** tab page appears.

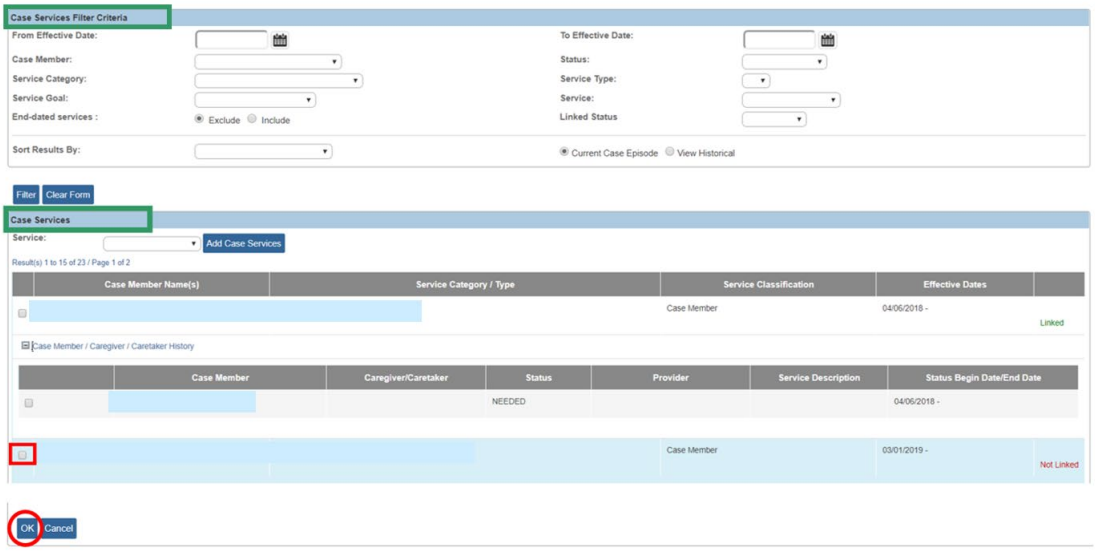
Completing the Services Tab Page

1. Enter narrative in response to the following question: **What steps will the family take to achieve what the family and caseworker want to see happen? Identify the individuals who will complete these action steps. (Services to address the concerns/needs)**.
2. Click, **Link Service**.



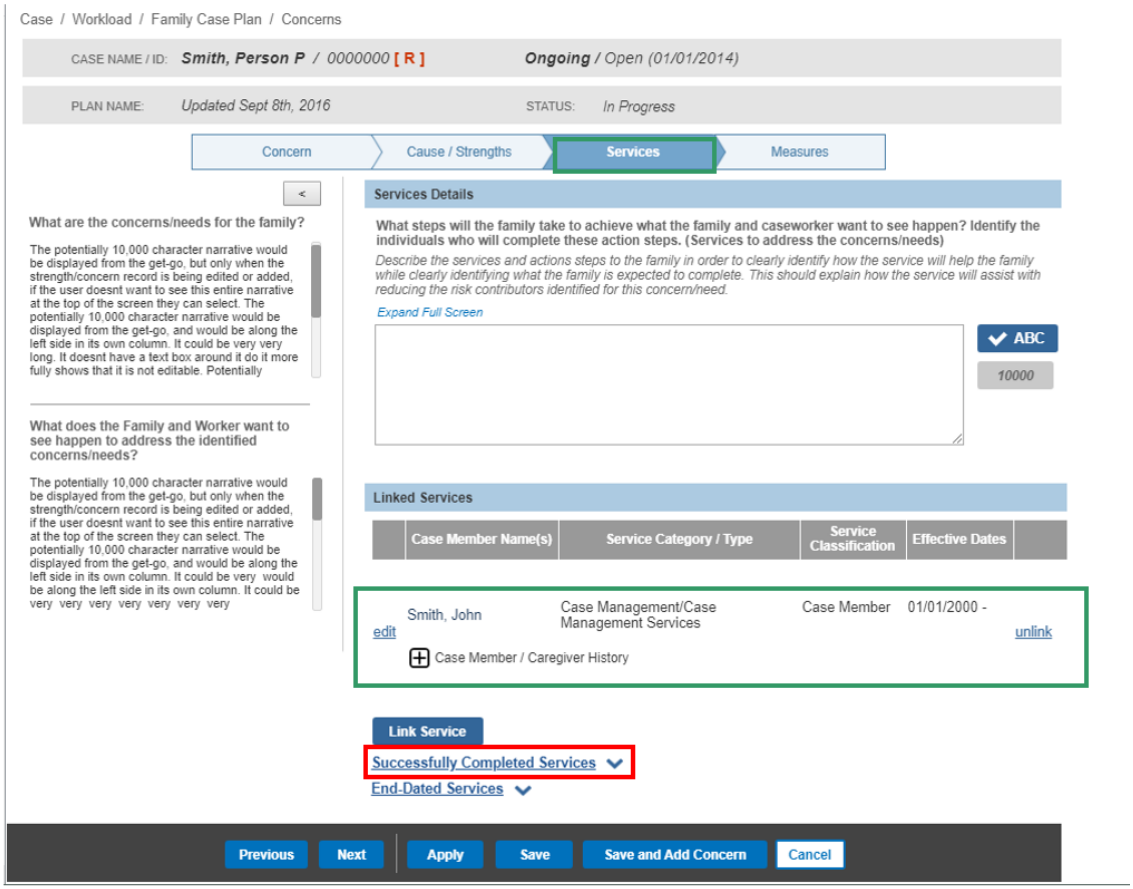
The **Case Services** screen appears.

3. Select the **Service** you wish to add by placing a checkmark in the check box beside the **Case Member's** name.
4. Click, **OK**.



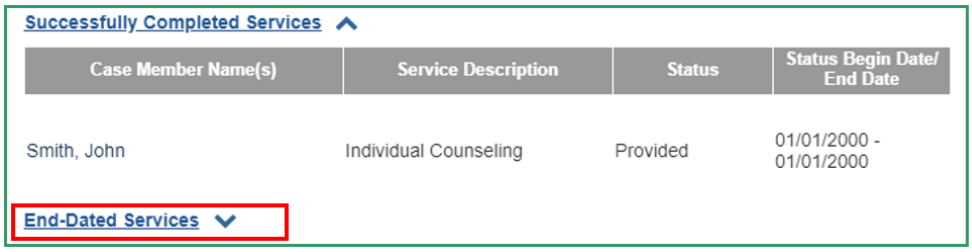
The **Services** tab page appears, listing the linked service in the **Linked Services** grid.

5. Click the **Successfully Completed Services** drawer to view details of services provided.



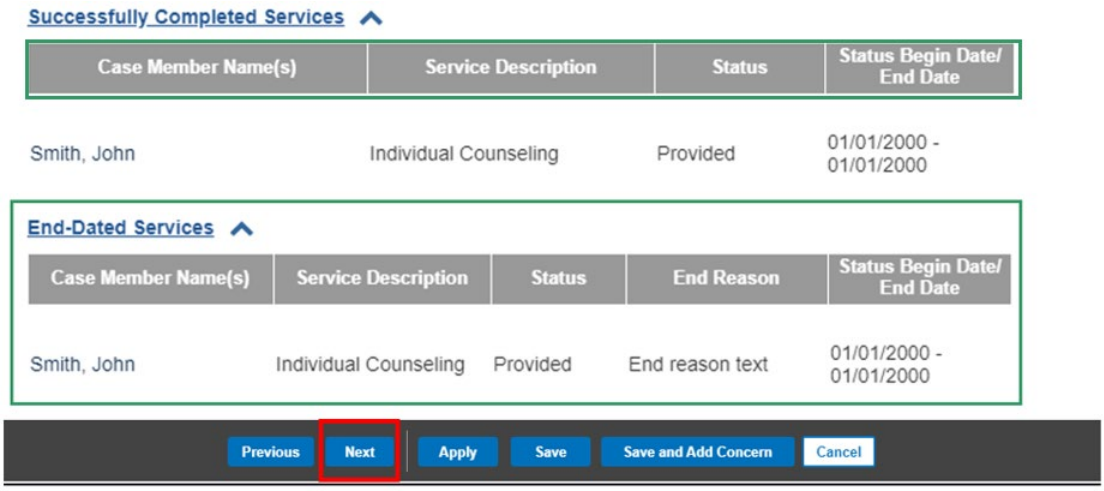
The drawer will expand to display the **Case Member Name(s)**, **Service Category/Type**, **Service Classification**, and **Effective Dates**

6. Click the **End-Dated Services** drawer.



The drawer expands to list the **Case Member Name(s)**, **Service Description**, **Status**, **End Reason**, and **Status Begin Date/End Date**.

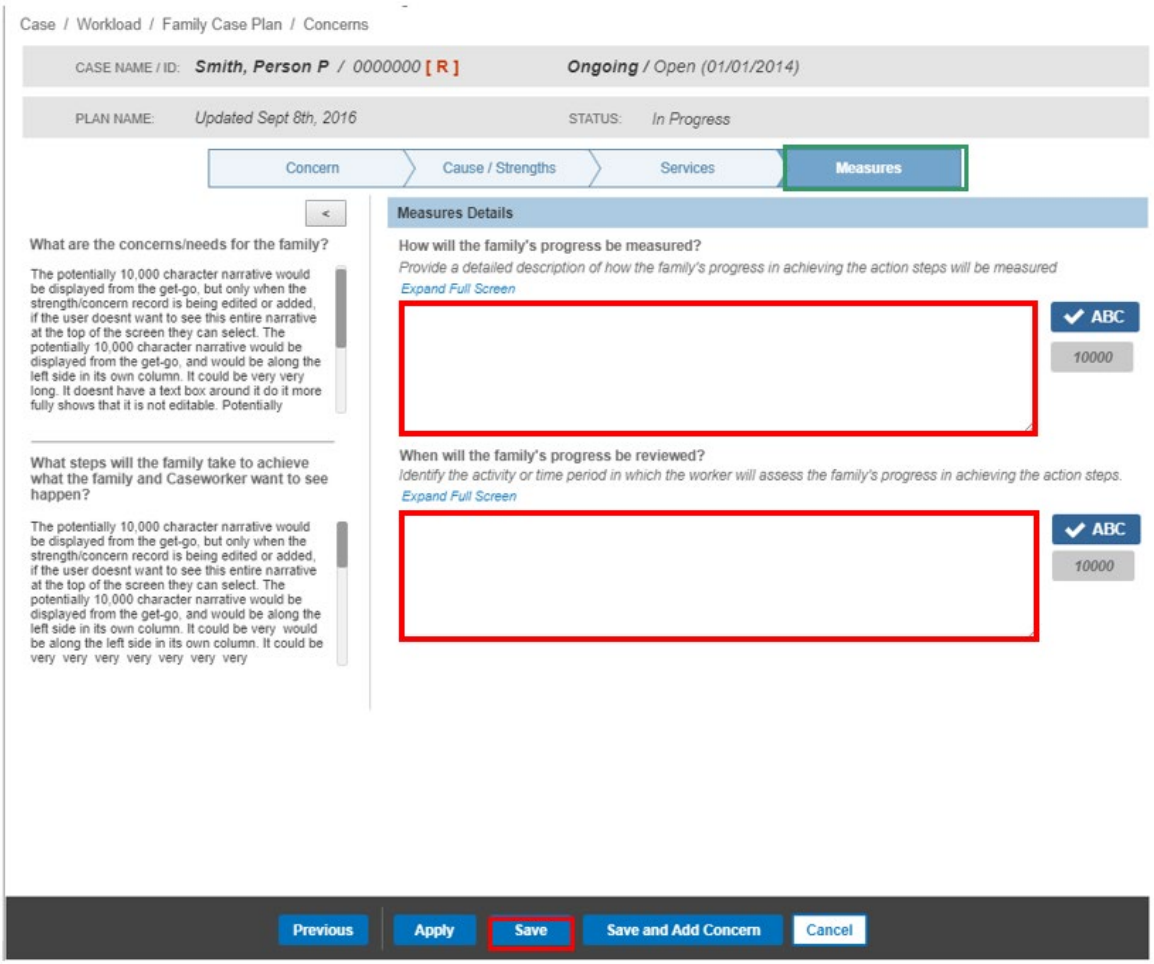
7. Click, **Next or Measures tab**.



The **Measures** tab page appears.

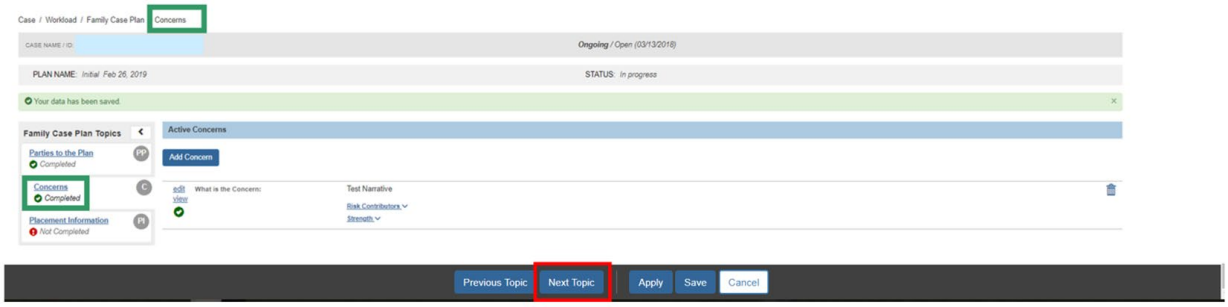
Completing the Measures Tab Page

1. Enter narrative in response to, **How will the family's progress be measured?**
2. Enter narrative in response to, **When will the family's progress be reviewed?**
3. Click, **Save**.



The **Concerns** screen appears, displaying, ***Completed***, under the **Concerns** link.

4. Click, **Next Topic**.



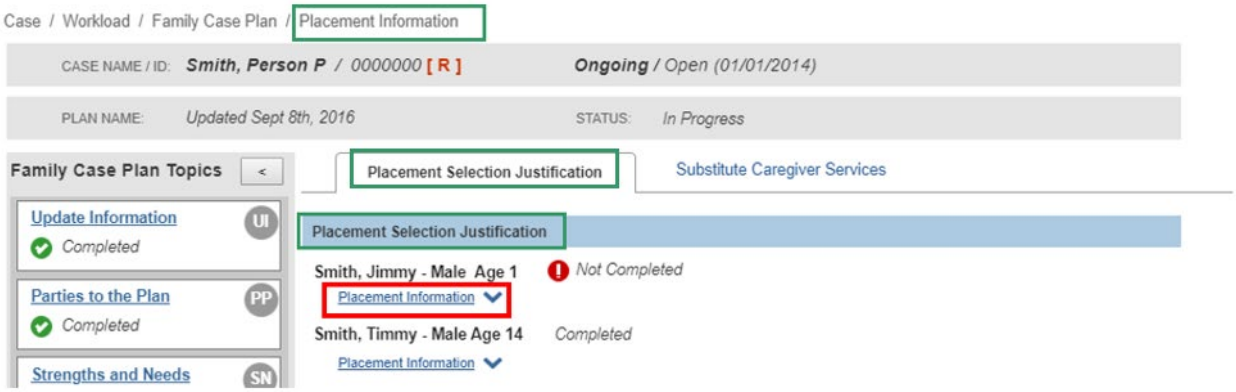
The **Placement Information** topic screen appears, defaulted to the **Placement Selection Justification** tab page.

Completing the Placement Information Topic

Completing the Placement Selection Justification Tab Page

Note: The Placement Information topic displays when at least one child case plan participant is in a non-end-dated completed placement setting.

1. In the **Placement Selection Justification** grid, click the **Placement Information** drawer.

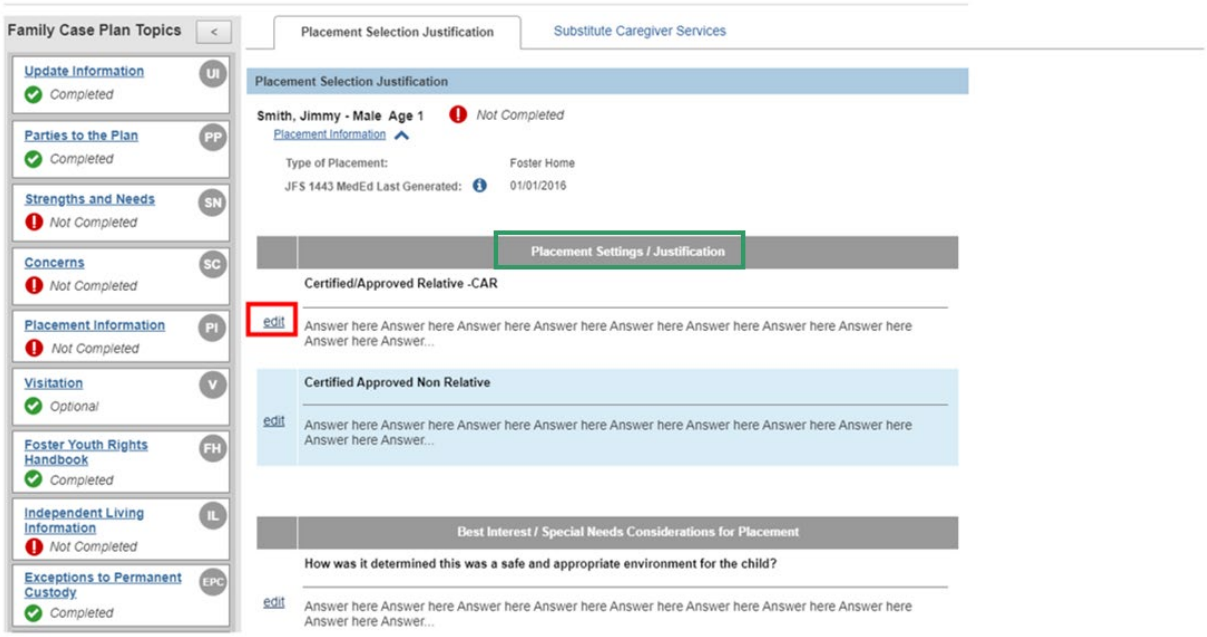


The drawer will expand to display three additional grids:

- **Placement Settings/Justification**
- **Best Interest/Special Needs Considerations for Placement**
- **Educational Stability Assurances**

In the **Placement Settings/Justification** grid:

2. Click, **edit**, for each of the following less restrictive Placement Types listed for the child case plan participant:



The **Setting Narrative Details** screen appears.

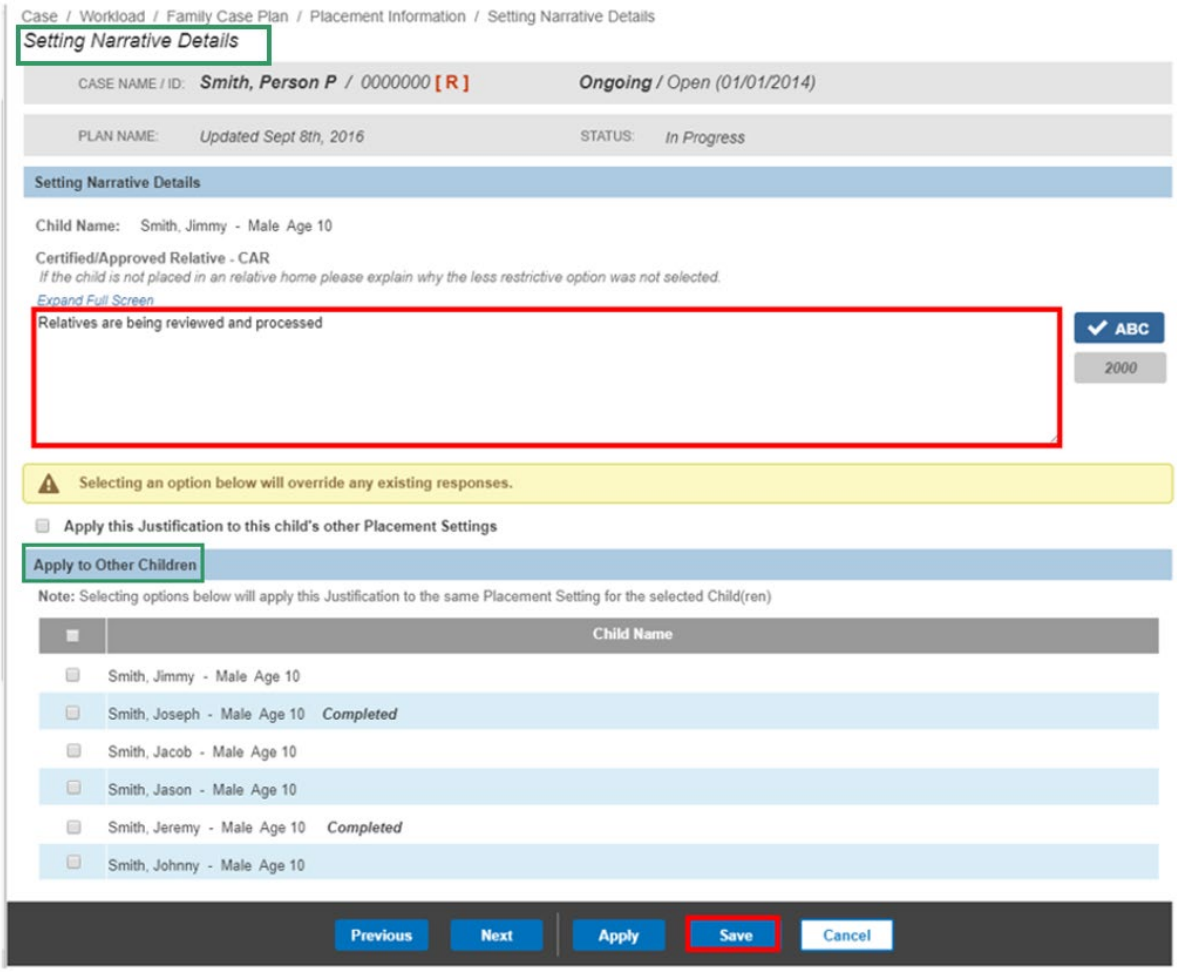
Note: This screen will appear for the placement setting option you select.

3. Enter narrative in the text box.

   Note: You can **Apply this Justification to this child's other Placement Settings**.

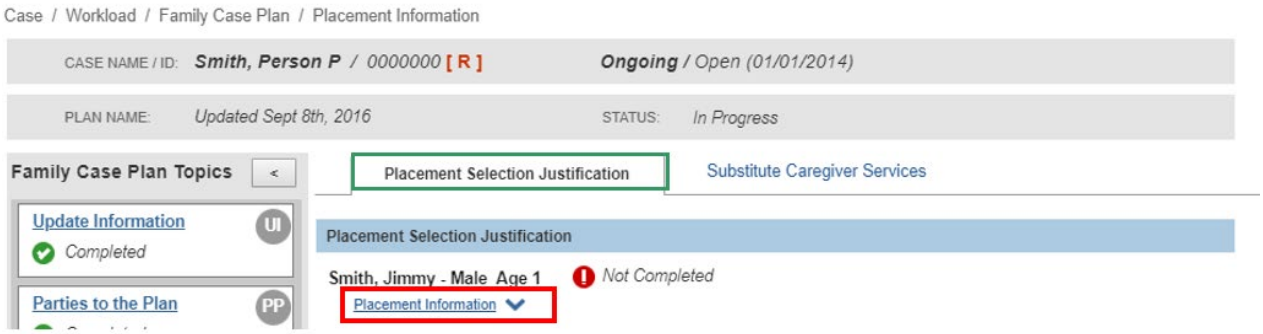
   If you select a child(ren) in the **Apply to Other Children** grid, the Justification will be applied **to the same Placement Setting for the selected Child(ren)**.

4. Click, **Save**.



The **Placement Selection Justification** tab page appears.

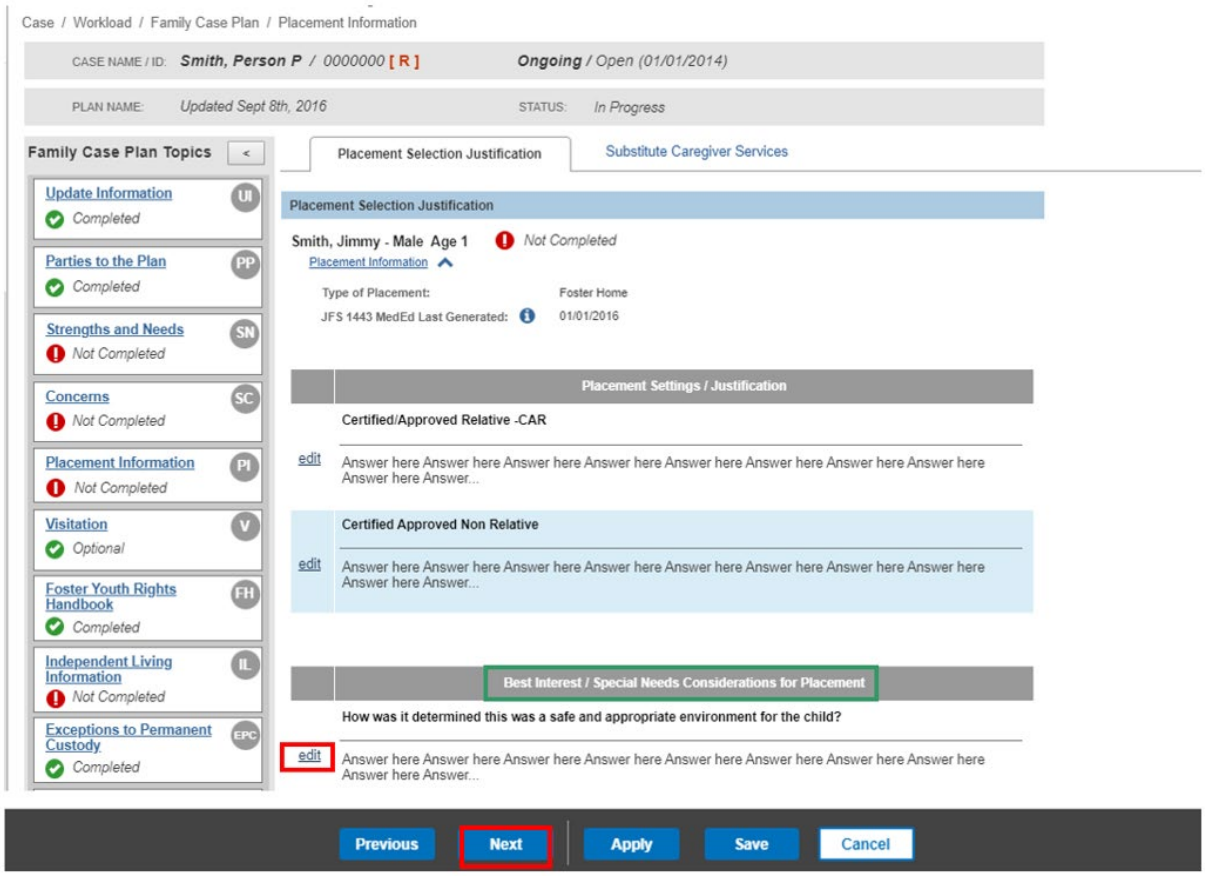
1. Click the **Placement Information** drawer.



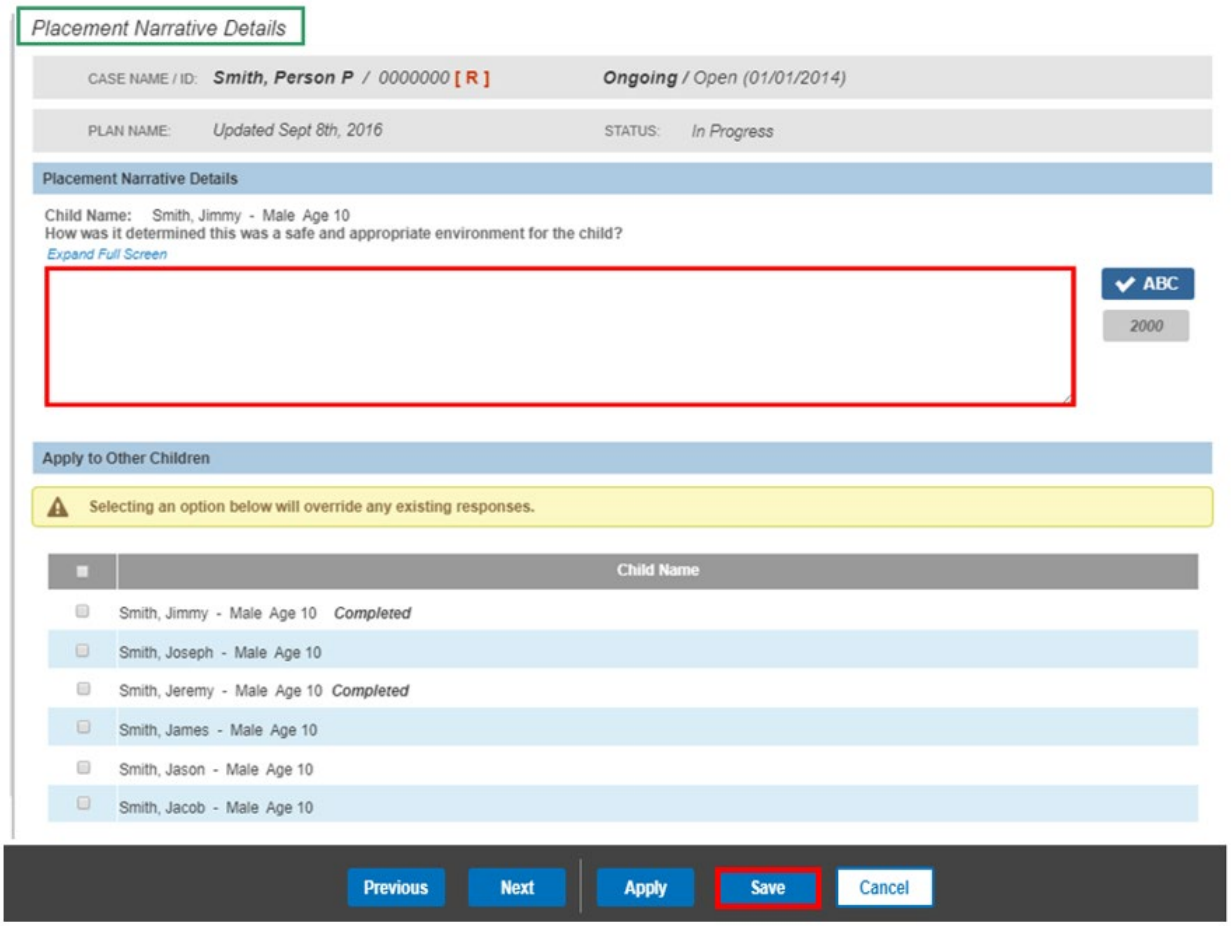
The drawer expands to display the Placement Settings/Justification grid, the **Best Interest/Special Needs Considerations for Placement** grid, and the **Educational Stability Assurances** grid.

2. In the **Best Interest/Special Needs Consideration** for **Placement** grid, click **edit** beside each question. The **Placement Narrative Details** screen will appear to each corresponding question. Enter the narrative for each question.
   - **How was it determined this was a safe and appropriate environment for the child?**
   - **How was it determined this was a safe and appropriate environment for the child?**
   - **How will the placement meet the special needs for the child?**
   - **How will the placement meet the Family Case Plan goals of the child?**
   - **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?**

   Important: You can click **Next**, through each Placement Narrative Details screen, in the **Best Interest/Special Needs Consideration for Placement** grid, until all screens within the Placement Information topic are complete. Ohio SACWIS will save your work as you navigate among the screens. It is not necessary to complete the screens in a specific order.

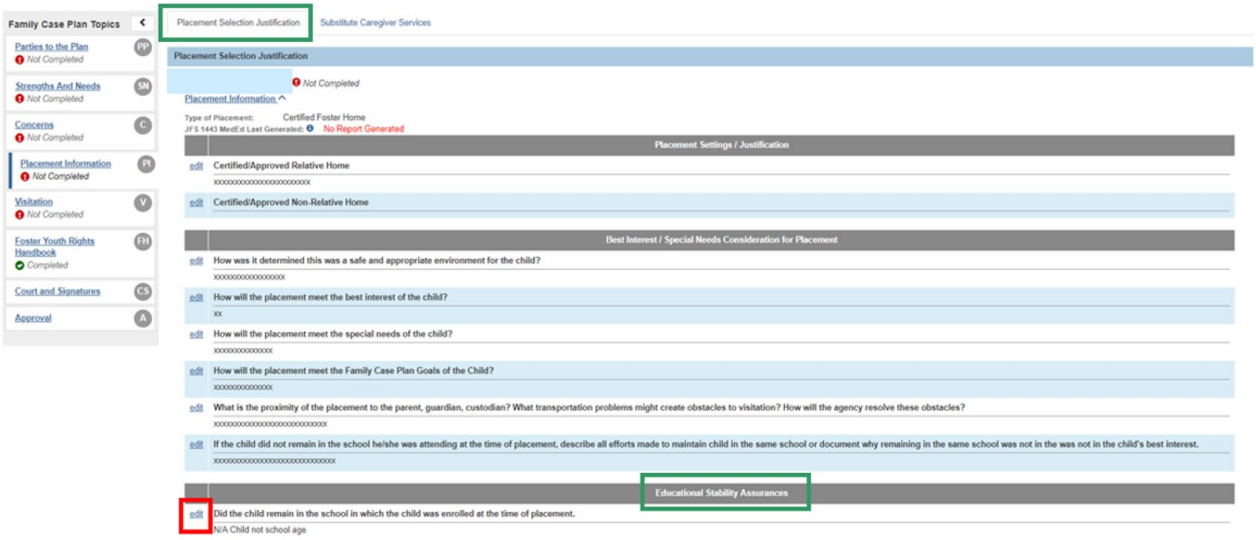


3. When you have completed each of the Placement Narrative Details screen, click, **Save**.



The **Placement Selection Justification** tab page appears.

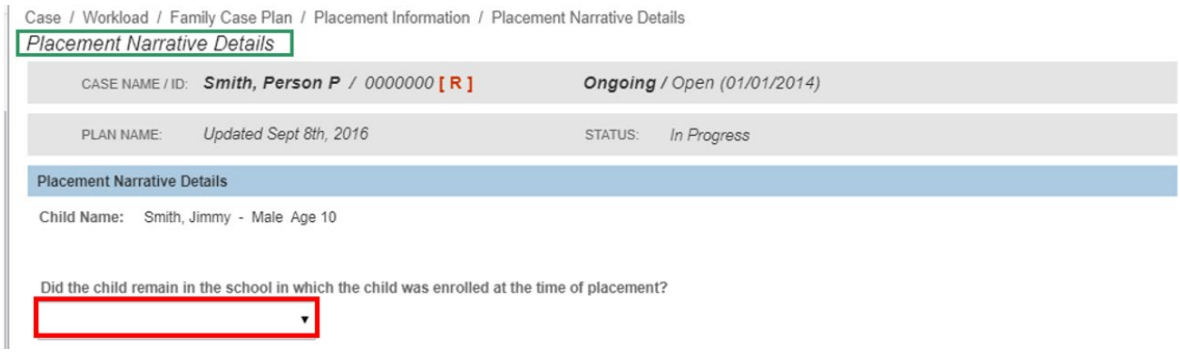
1. In the **Educational Stability Assurances** grid, click, **edit** beside: **Did the child remain in the school in which the child was enrolled at the time of placement.**



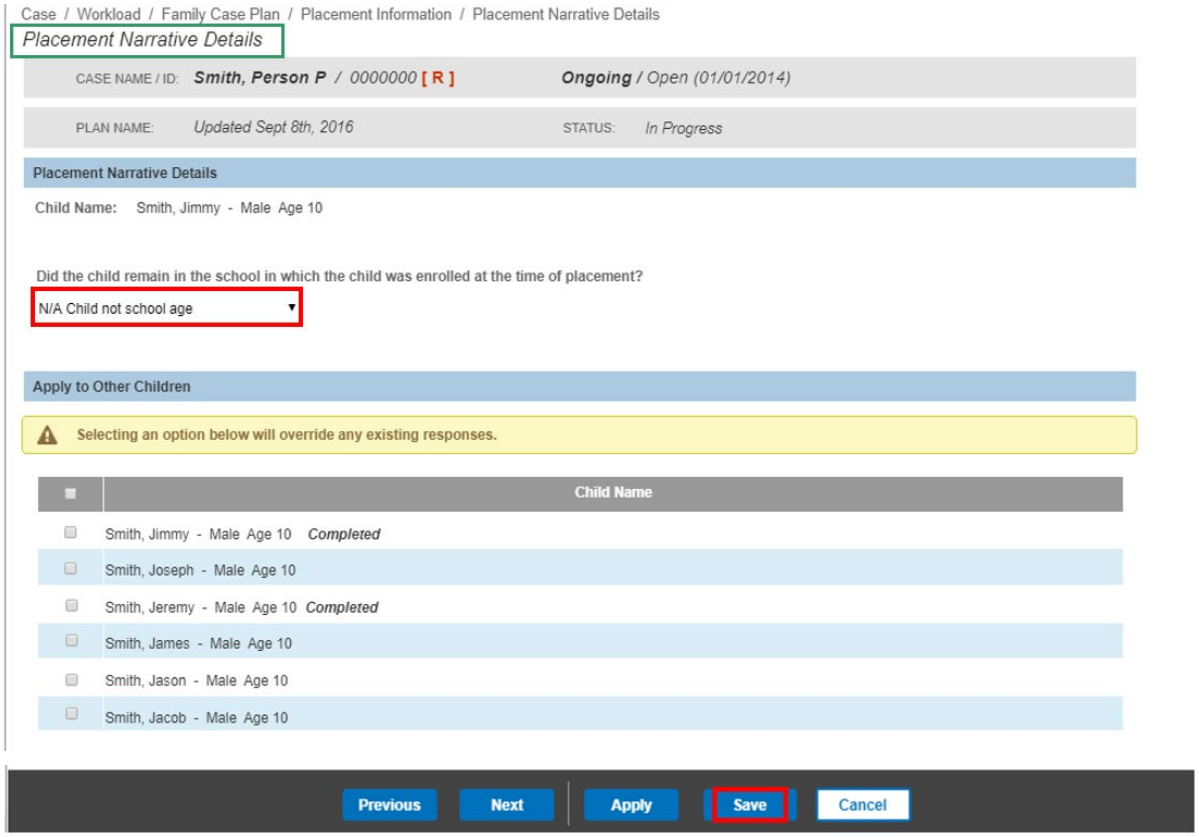
The **Placement Narrative Details** screen appears.

1. Make a selection from the drop-box in response to: **Did the child remain in the school in which the child was enrolled at the time of placement?**

   Note: Your selection from the drop-down menu will determine whether additional information is required. If further information is required, the screen will expand when you make your selection in response to the school question.



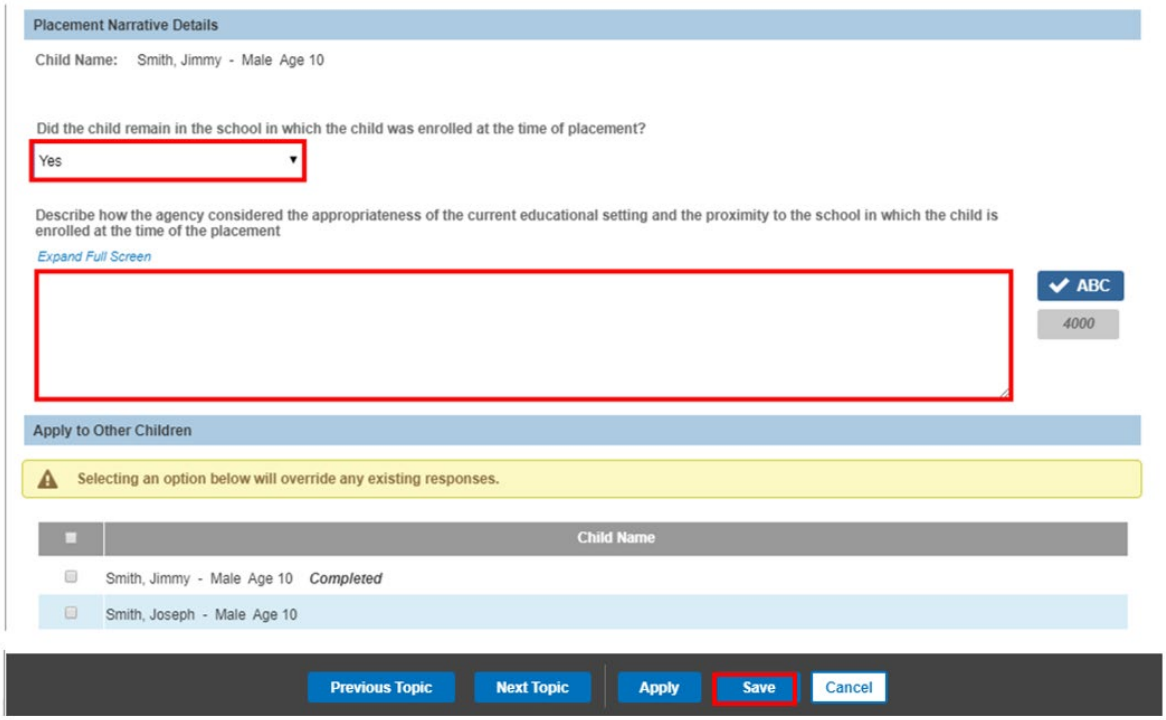
2. If your response to the school question is **N/A Child not school age**, click, **Save**.



3. If your response to the education question is, **Yes**, the screen will expand, and you will need to enter narrative in response to: **Describe how the agency considered**

the appropriateness of the current educational setting and the proximity to the school in which the child is enrolled at the time of the placement.

4. Click, **Save**.



If your response to the school question is, **No**, the screen will expand, and you will need to add narrative in response to the following:

5. **Describe how the agency considered the appropriateness of the current educational setting and the proximity to the school in which the child is enrolled at the time of the placement.**
6. **Since the child did note remain in the same school, Describe how the agency coordinated with the appropriate local educational agencies to determine this was in the best interest of the child.**
7. **Describe how the agency and the local educational agencies ensured the immediate and appropriate enrollment in the new school with all of the educational records of the child provided to the new school.**
8. Click, **Save**.

Case / Workload / Family Case Plan / Placement Information / Placement Narrative Details

Placement Narrative Details

CASE NAME / ID: ***Smith, Person P*** / *0000000* **[R]** ***Ongoing*** / *Open (01/01/2014)*

PLAN NAME: *Updated Sept 8th, 2016* STATUS: *In Progress*

Placement Narrative Details

Child Name: Smith, Jimmy - Male Age 10

Did the child remain in the school in which the child was enrolled at the time of placement?

No

Describe how the agency considered the appropriateness of the current educational setting and the proximity to the school in which the child is enrolled at the time of the placement

Expand Full Screen

ABC

4000

Since the child did not remain in the same school, describe how the agency coordinated with the appropriate local educational agencies to determine this was in the best interest of the child.

Expand Full Screen

ABC

4000

Describe how the agency and the local educational agencies ensured the immediate and appropriate enrollment in the new school with all of the educational records of the child provided to the new school.

Expand Full Screen

ABC

4000

Apply to Other Children

Selecting an option below will override any existing responses.

	Child Name
☐	Smith, Jimmy - Male Age 10 *Completed*
☐	Smith, Joseph - Male Age 10
☐	Smith, Jeremy - Male Age 10 *Completed*
☐	Smith, James - Male Age 10

Previous Topic | Next Topic | Apply | Save | Cancel

The **Placement Selection Justification** tab page appears.

1. Click the **Substitute Caregiver Services** tab.

The **Substitute Caregiver Services** tab page appears.

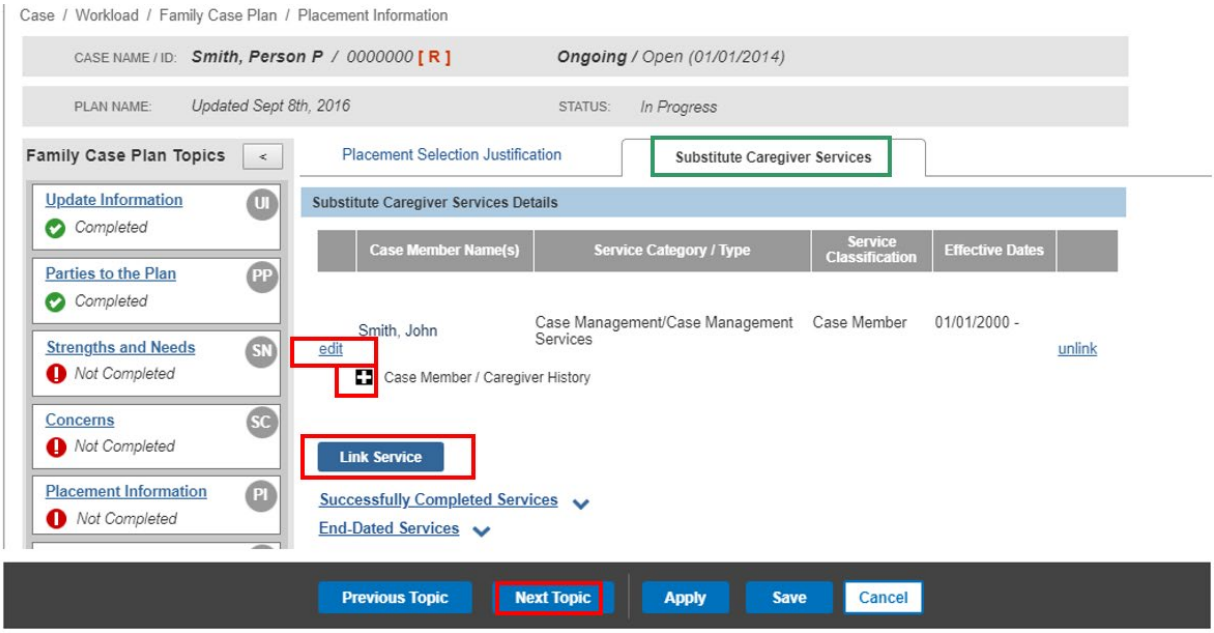
Completing the Substitute Caregiver Services Tab Page

Any linked service(s) will appear In the **Substitute Caregiver Services Details** grid.

Note: You have the option to click, **edit**, beside the name of a case member if you need to edit information on the **Case Services** page (including entering an **End Date** for the service).

1. If necessary, click, **Link Service**, and follow previously discussed instruction for linking a service.
2. You can click the **Case Member/Caregiver History** drawer to review available information.
3. Click OK.

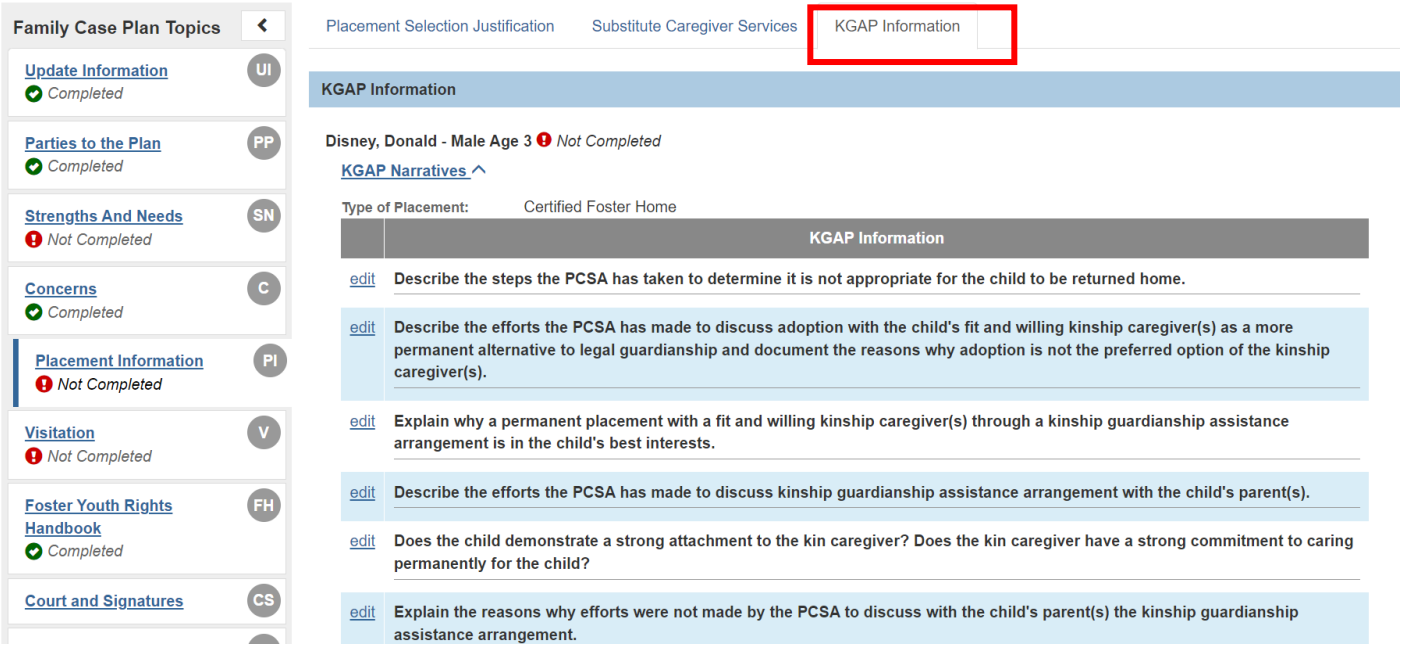
The **Substitute Caregiver Services** tab page appears.



Completing the KGAP Information Tab

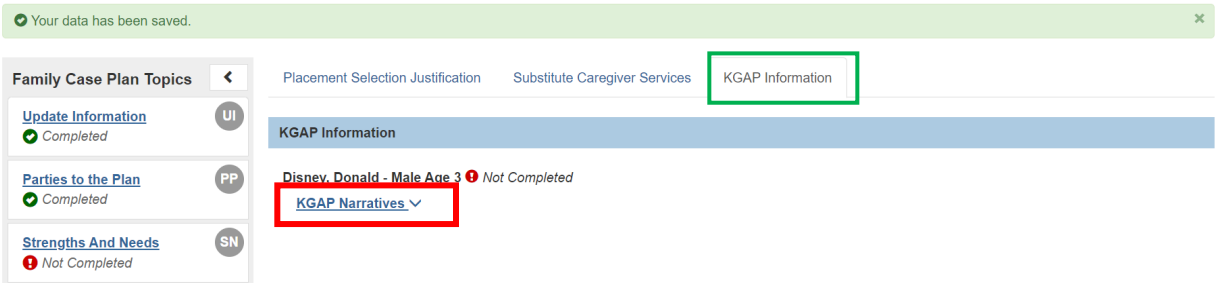
Note: The KGAP Information tab will display based on information recorded on the Parties to the Plan Topic. Refer to the **Completing Parties to the Plan** section.

1. Click the **KGAP Information** Tab, if applicable.



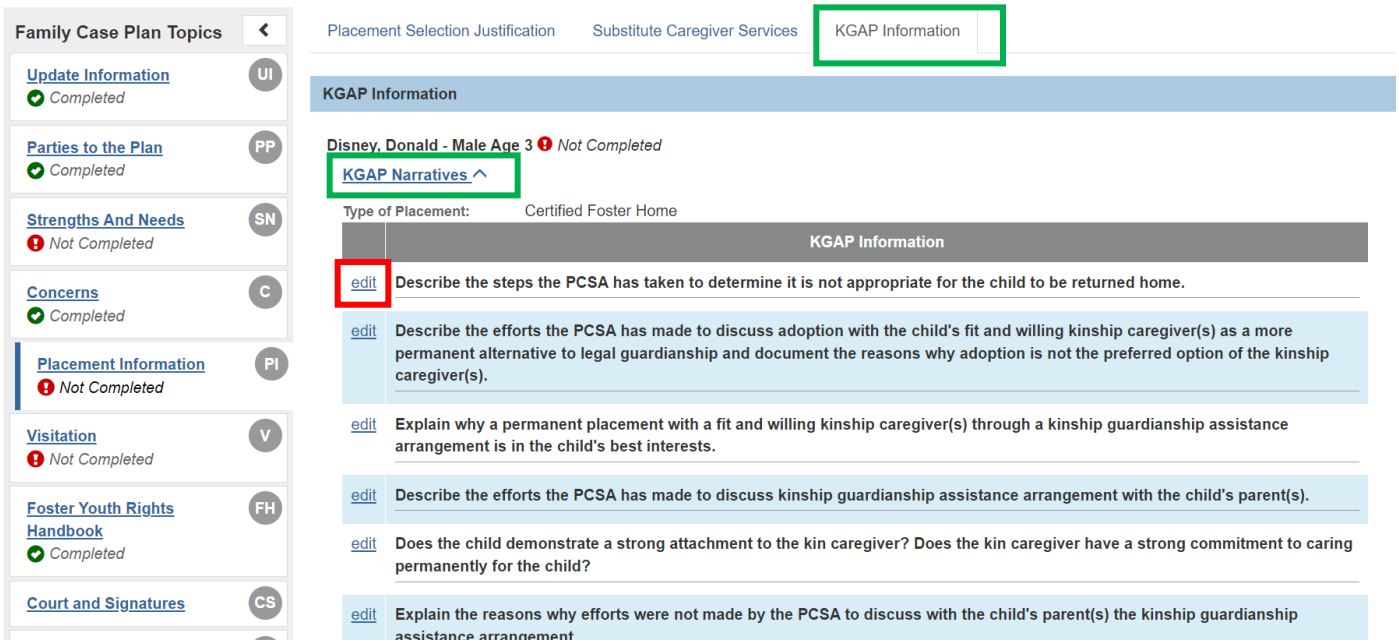
The **KGAP Information** Tab page appears.

2. In the KGAP Information grid, click the KGAP Narratives drawer.



The drawer will expand to display eight questions.

3. Click, **edit**, for each of the following KGAP Information Narratives listed for the child case plan participant.



The **KGAP Narrative Details** screen appears.

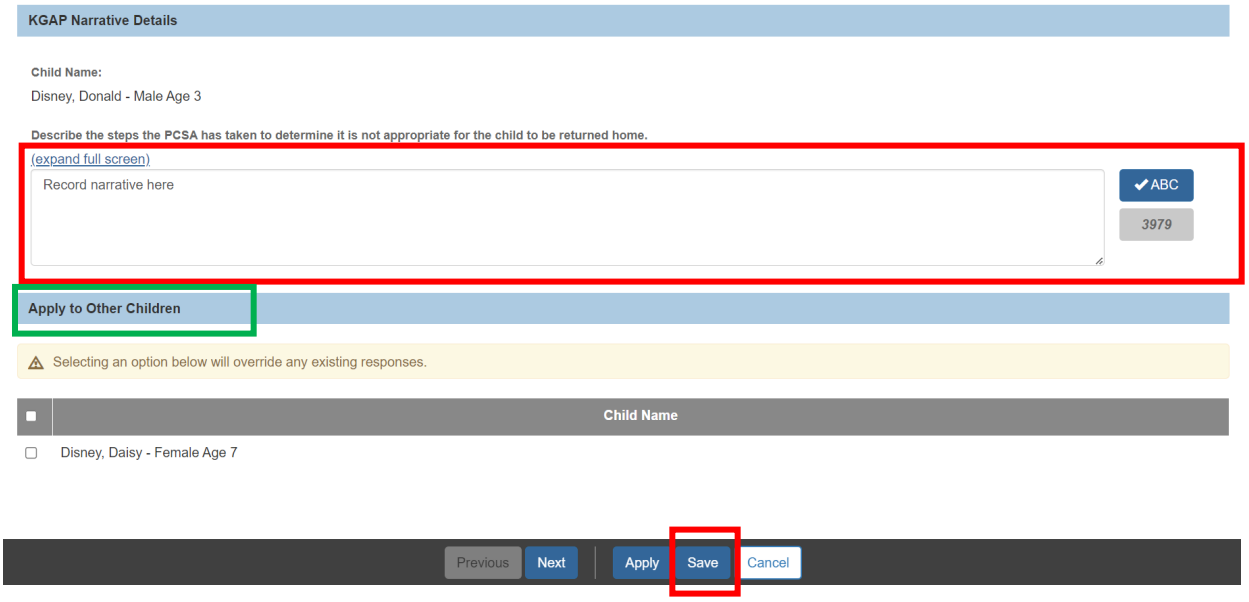
4. Enter narrative in the text box.

   For Questions six (6) through eight (8), the option to mark the question as **Not Applicable** is available.

   Note: You can **Apply to Other Children**.

   If you select a child(ren) in the **Apply to Other Children** grid, the KGAP Narrative will be applied **to the same KGAP Question for the selected Child(ren)**.

5. Click, **Save**.

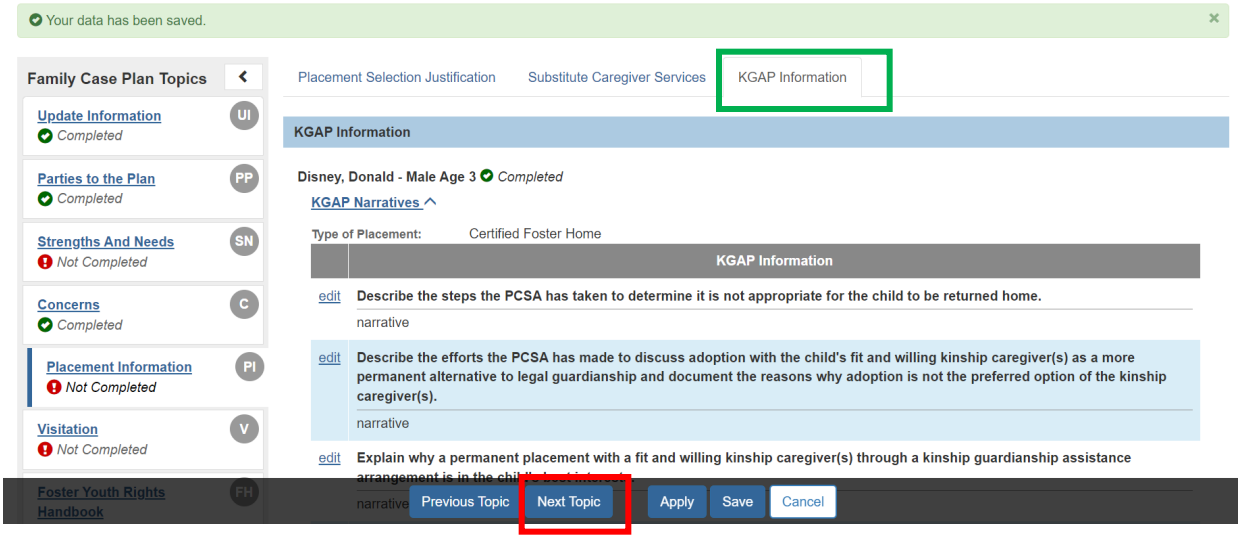


Important: The narratives in these KGAP Question Narrative are automatically pulled into the child's KGAP Eligibility record to determine the child's KGAP Eligibility. These narratives will be reviewed by the KGAP Eligibility specialist at the State Level to ensure the child meets the KGAP Eligibility requirements. (Family Case Plan updates for KGAP are not included in Eligibility when the KGAP Application is for the sibling of a child already in receipt of KGAP).

For additional information refer the Policy and Practice Guidance Document (PPGD) #038.

The **KGAP Information** Tab screen appears, displaying, ***Completed***.

6. Click, **Next Topic**



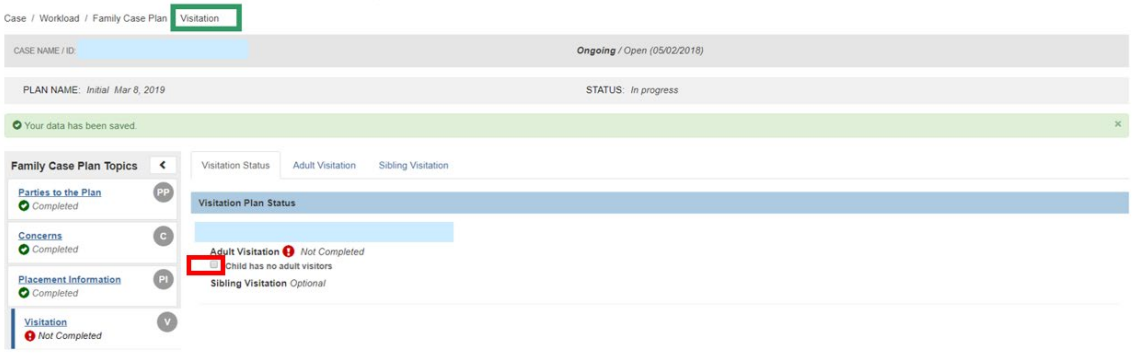
The **Visitation** screen appears, defaulted to the **Visitation Status** tab.

Completing the Visitation Topic

Completing the Visitation Status Tab Page

Note: The Visitation topic displays when at least one child case plan participant is in a non-end-dated completed placement setting or a non-end-dated Living Arrangement. The Visitation Topic is an optional topic to complete for an Adoption Family Case Plan.

1. If relevant, place a checkmark in the check box next to: **Child has no adult visitors**.

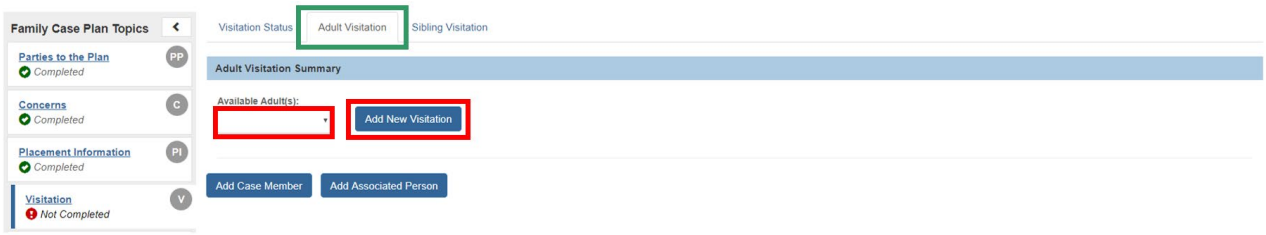


The screen will expand, requesting further information

2. Enter narrative in response to: **Justification for not having adult visitors.**
3. Click the **Adult Visitation** tab.

The **Adult Visitation** tab page appears.

1. Make a selection from the **Available Adult(s)** drop-down menu.
2. Click, **Add New Visitation**.

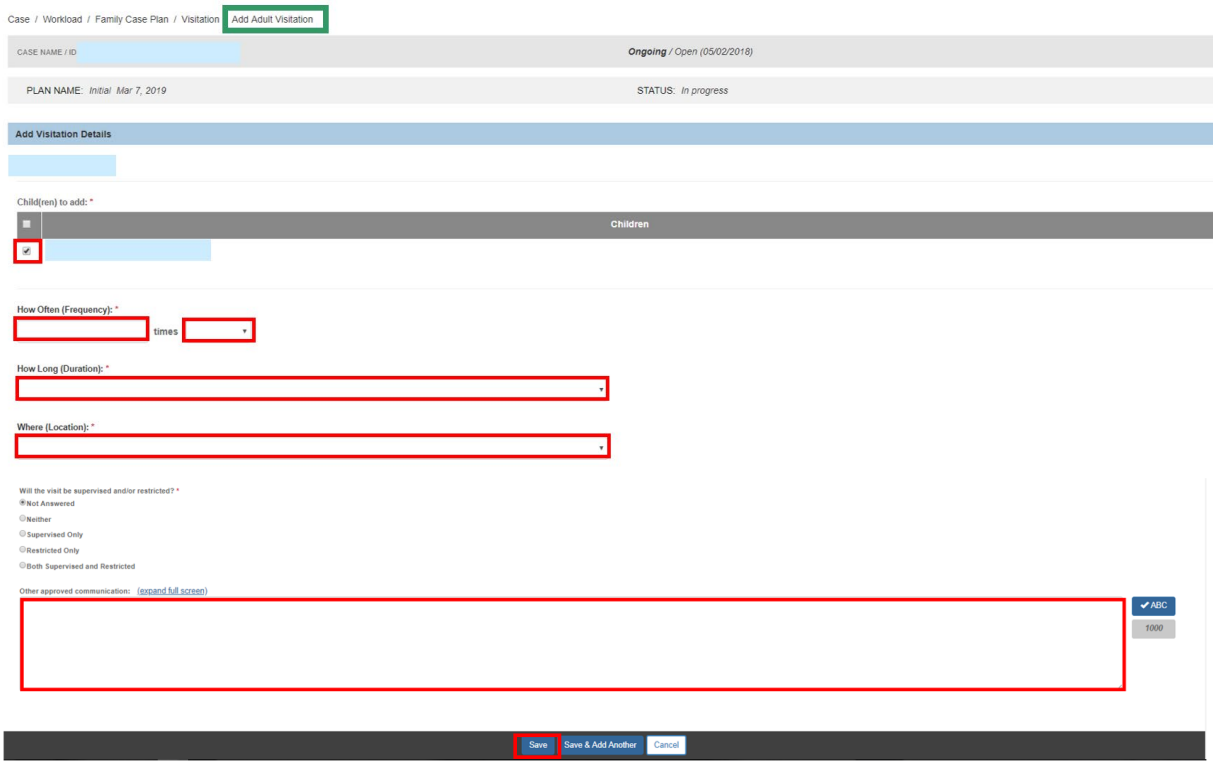


The **Add Adult Visitation** screen appears.

1. Place a checkmark in the check box beside the name of the child(ren) you wish to have visitation.
2. Enter a number in the **How Often (Frequency)** box.
3. Make a selection from the **times** drop-down menu.
4. Make a selection from the **How Long (Duration)** drop-down window.
5. Make a selection from the **Where (Location)** drop-down menu.
6. Using the radio buttons, select an option under: **Will the visit be supervised and/or restricted?**

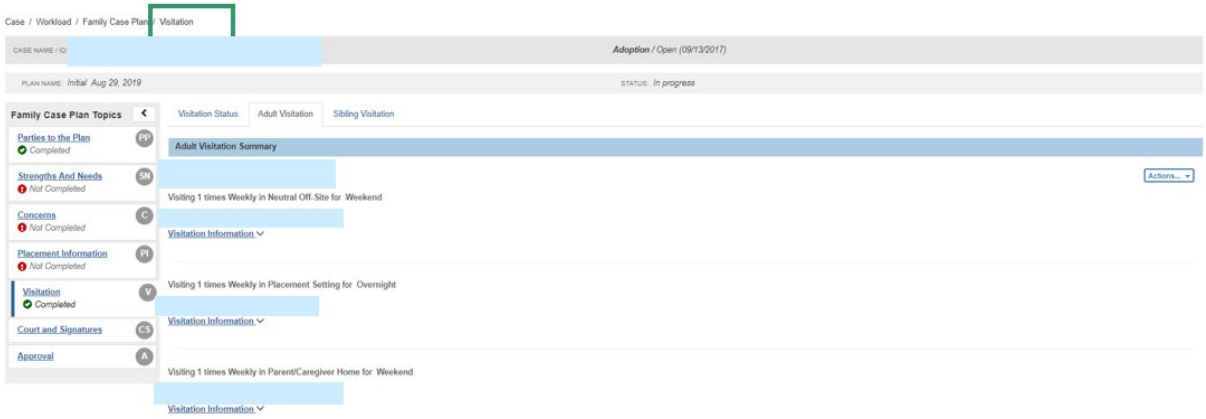
   Note: If the selection of **Supervised Only**, **Restricted Only** or **Both Supervised and Restricted** are made, a narrative box displays to explain the reasons.

7. Enter narrative in the **Other approved communication** text box.
8. Click, **Save**.



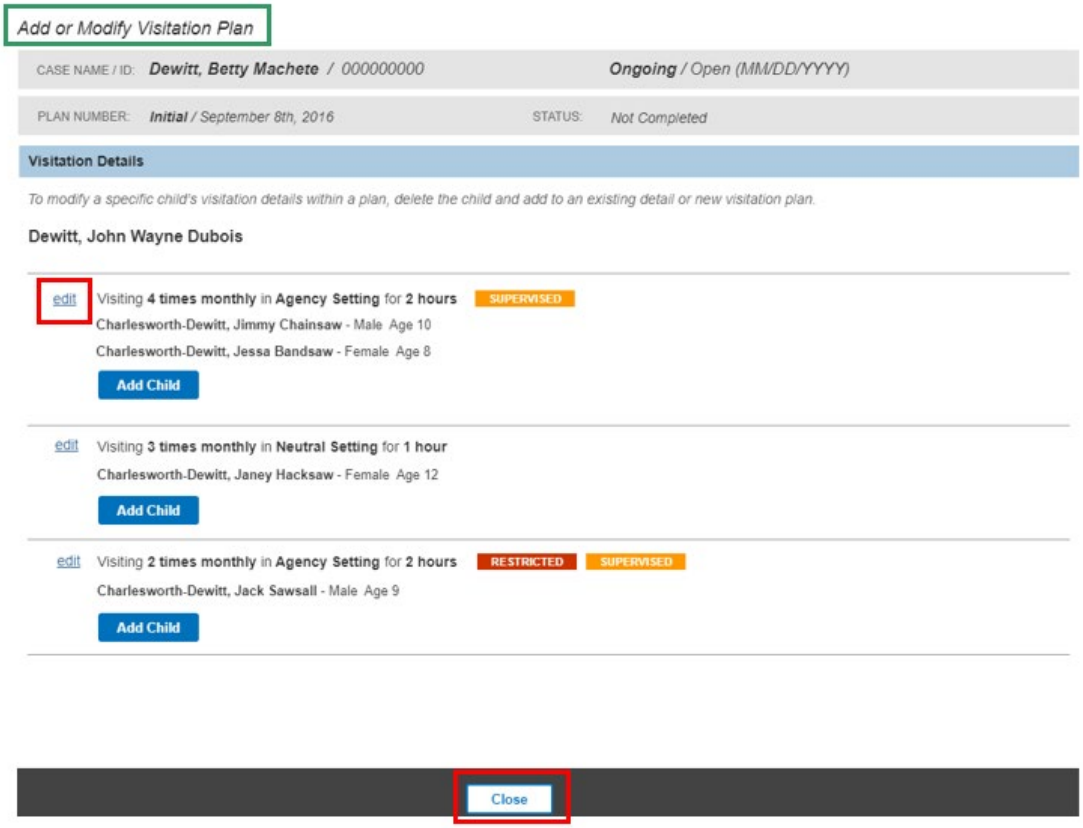
The **Visitation** screen appears; the **Adult Visitation Summary** grid displays the information you added.

Note: Repeat the instructions above for each Adult you wish to add for visitation.

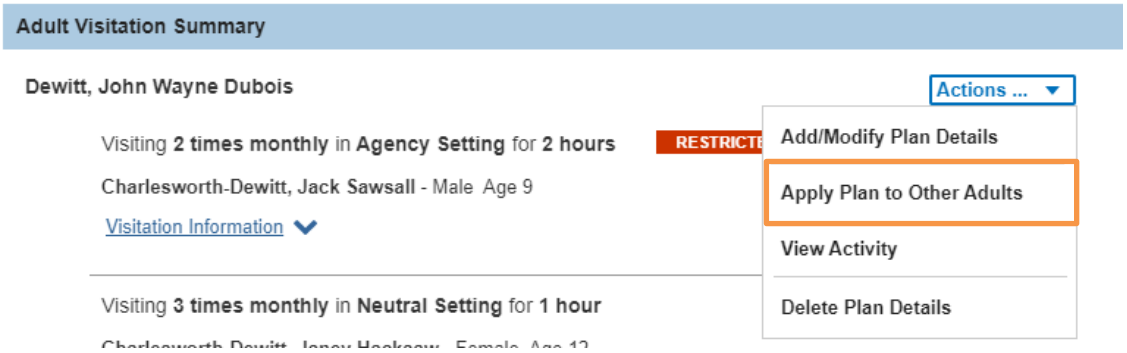


The **Add or Modify Visitation Plan** screen appears.

1. Click, **edit** to modify the visitation details and/or click the **Add Child button** to select additional children to add to the Visitation Plan.
2. Click, **Close**.

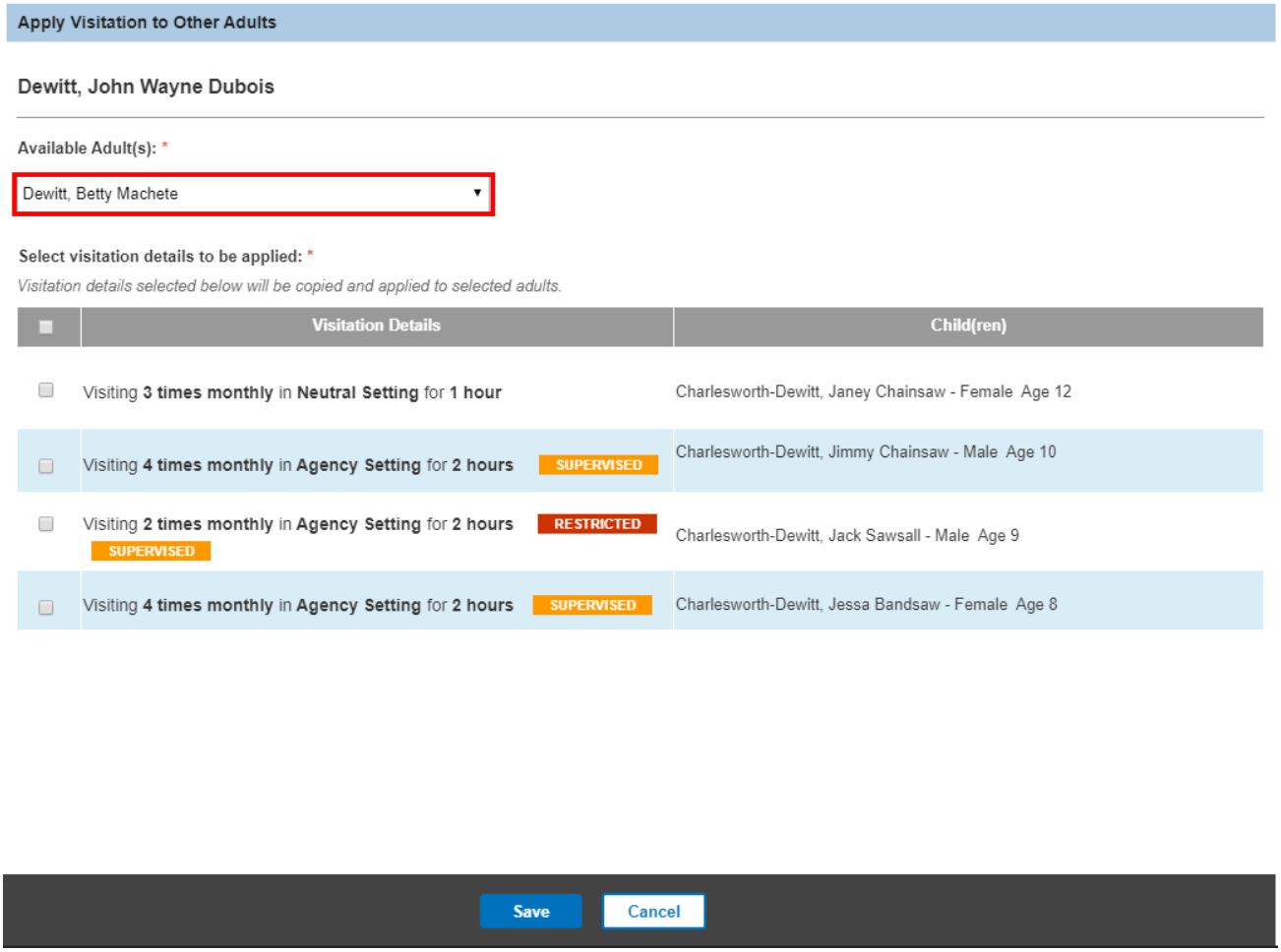


From the **Actions** dropdown, you can click, **Apply Plan to Other Adults.**

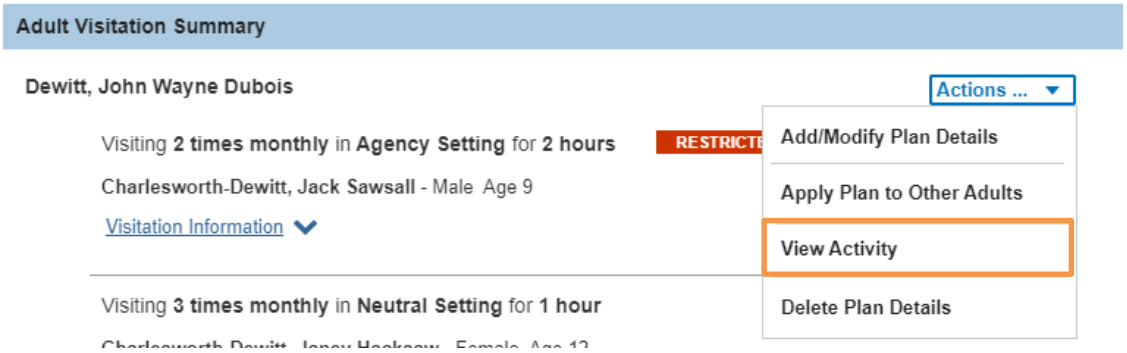


The **Apply Visitation to Other Adults** screen appears.

1. Make a selection from the **Available Adult(s)** drop-down menu of the Adult you want to apply available visitation plans.
2. **Select visitation details to be applied:**
3. Click, **Save.**

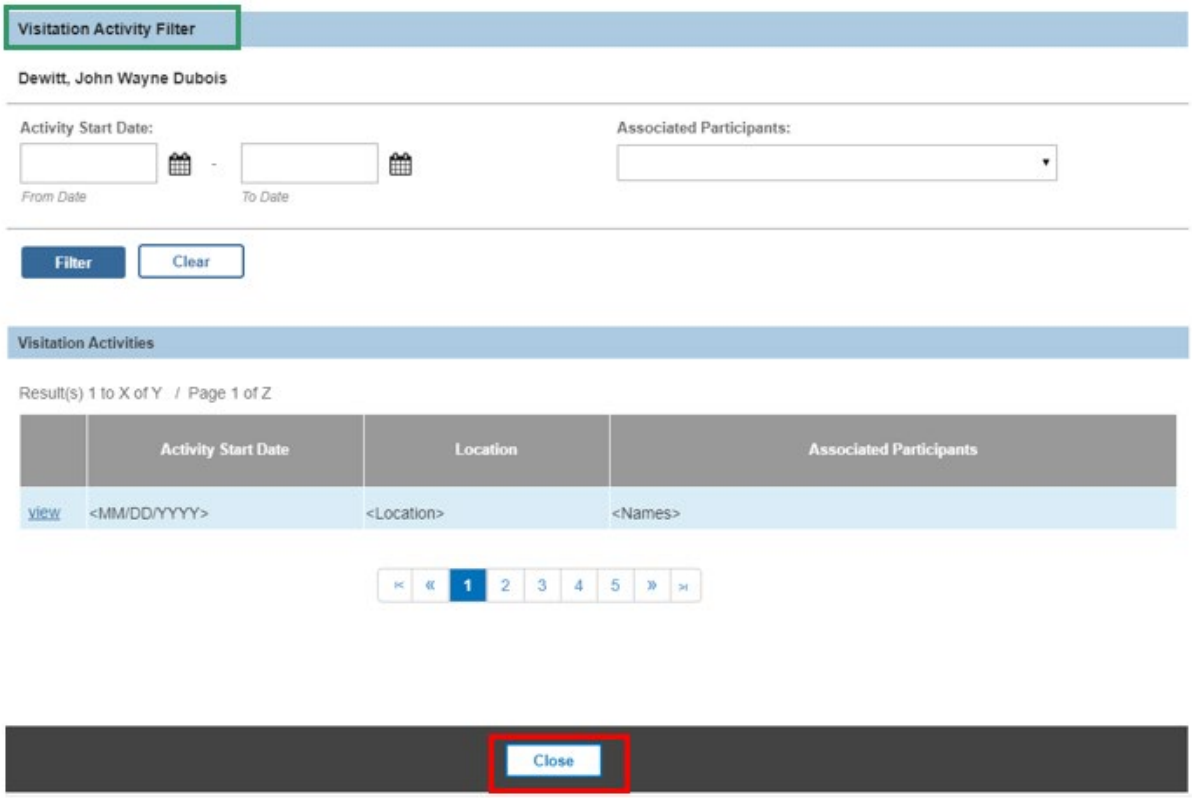


From the **Actions** dropdown, you can click, **View Activity.**

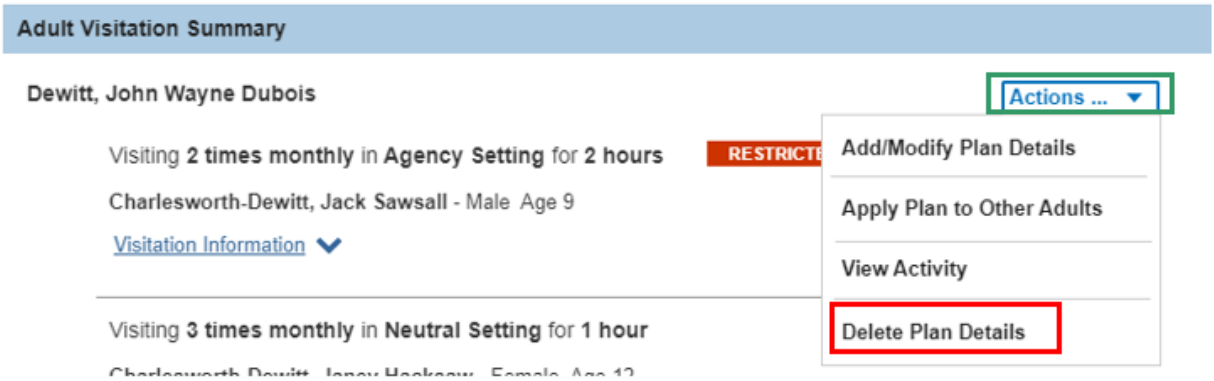


The **Visitation Activity Filter** screen appears.

1. Click, **view** on the Activity Log you would like to view. You will be navigated to the specific Activity Log linked to the Visitation Plan.
2. When back on the **Visitation Activity Filter** screen, click, **Close.**

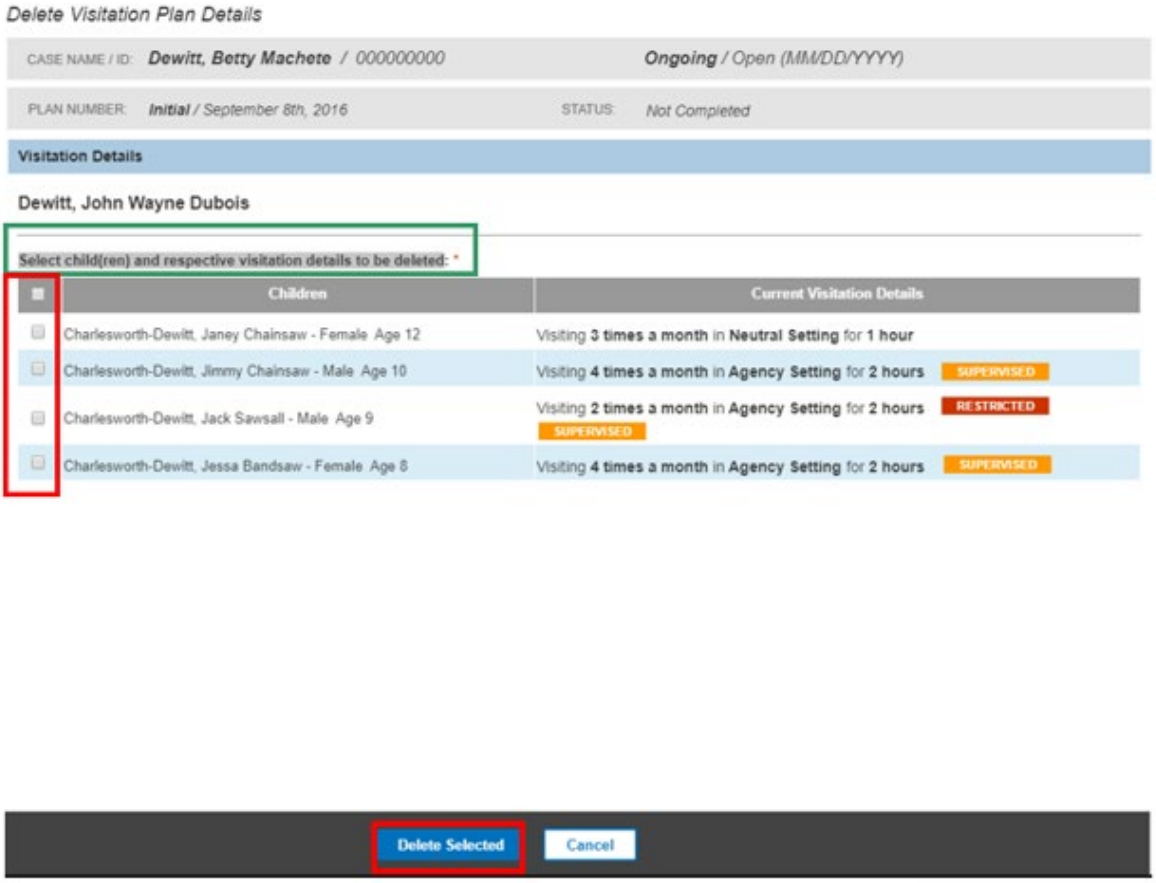


From the **Actions** dropdown, you can click, **Delete Plan Details.**



The **Delete Visitation Plan Details** screen appears.

1. Make a selection from the grid **Select child(ren) and respective visitation details to be deleted:**
2. Click, **Delete Selected**.

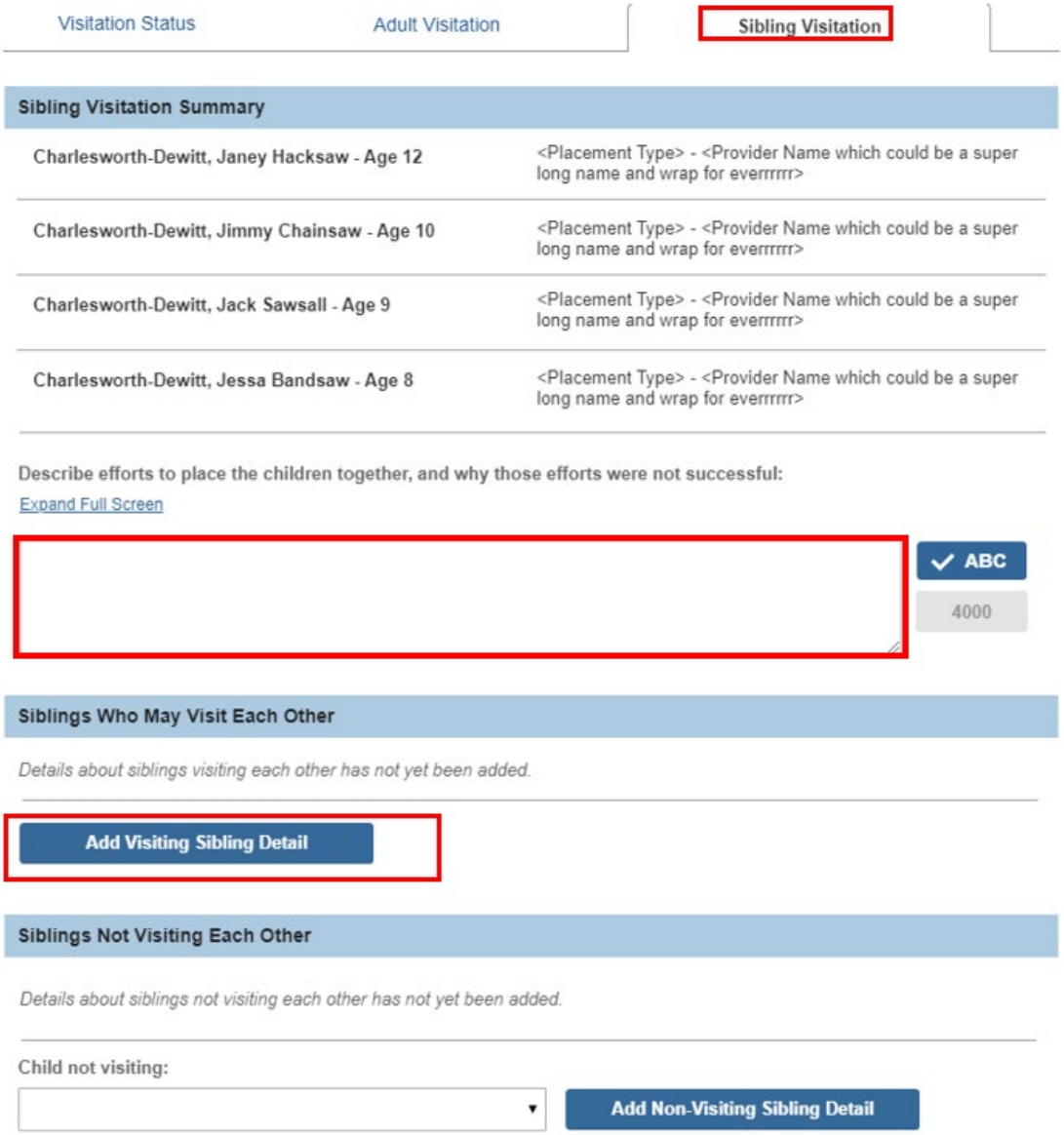


3. Click, the **Sibling Visitation** tab.

The **Sibling Visitation** tab page appears.

Adding Sibling Visitation

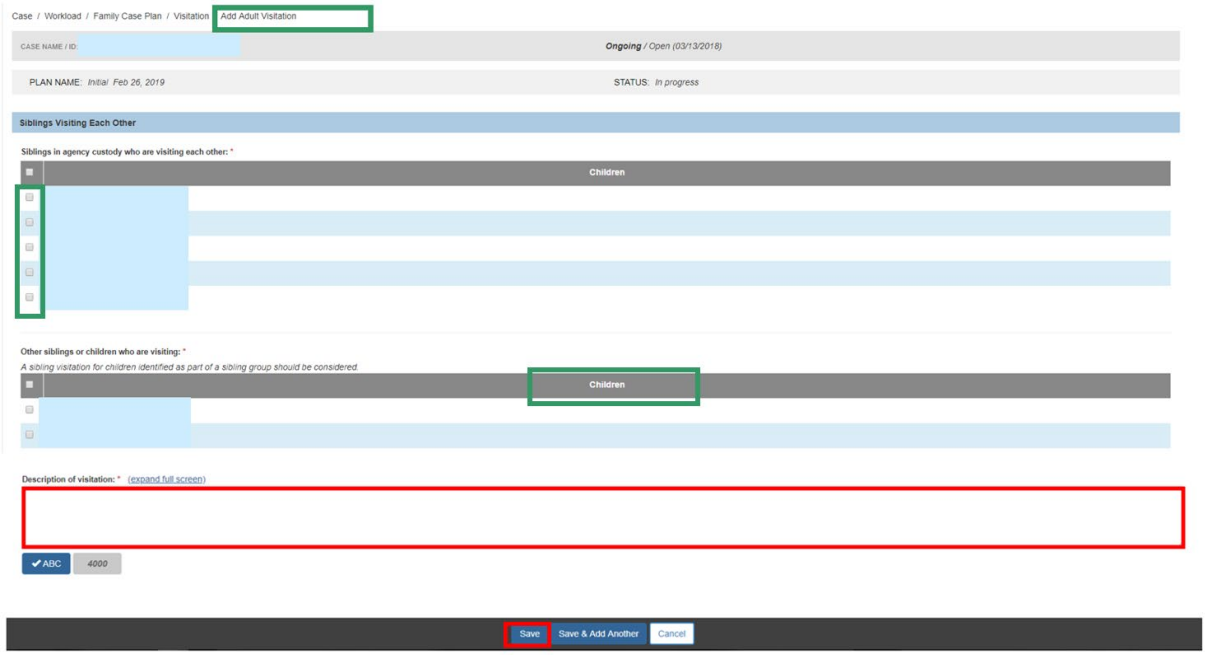
1. If applicable, enter narrative in response to: **Describe efforts to place the children together, and why those efforts were not successful**.
2. Click, **Add Visiting Sibling Detail**.



The **Sibling Visiting Each Other** screen appears.

1. Place a checkmark(s) in the check box(es) beside the relevant child(ren) in the **Siblings in agency custody who are visiting each other** grid.

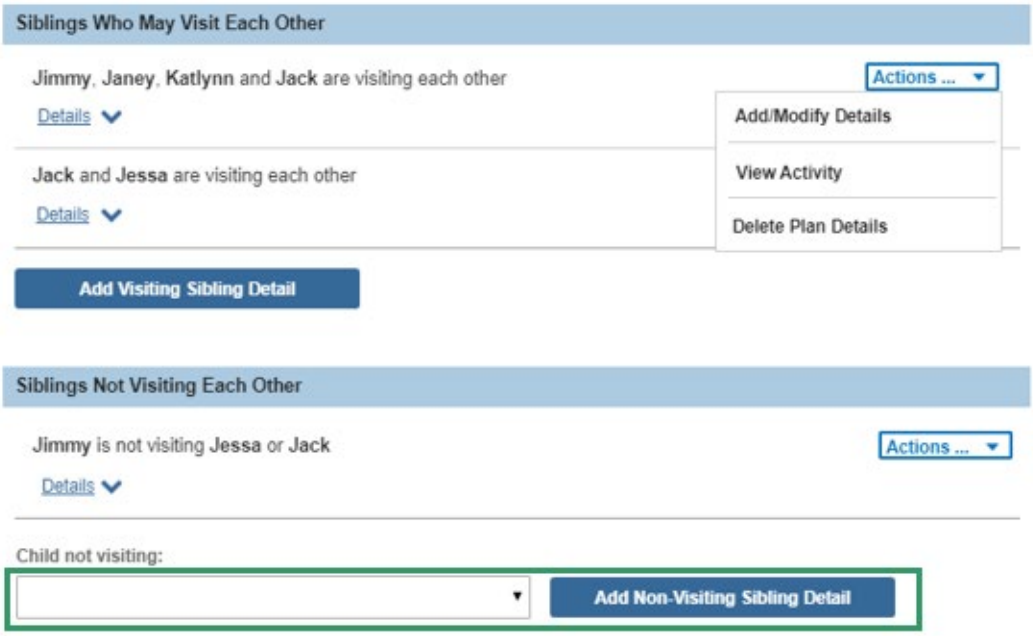
   Note: If applicable, select a child(ren) from those listed in the **Children** grid below **Other siblings or children who are visiting**.
2. Enter narrative in the text box below: **Description of visitation**.
3. Click, **Save**.



The **Sibling Visitation** tab screen appears, displaying the children with visitation in the **Siblings Who May Visit Each Other** grid.

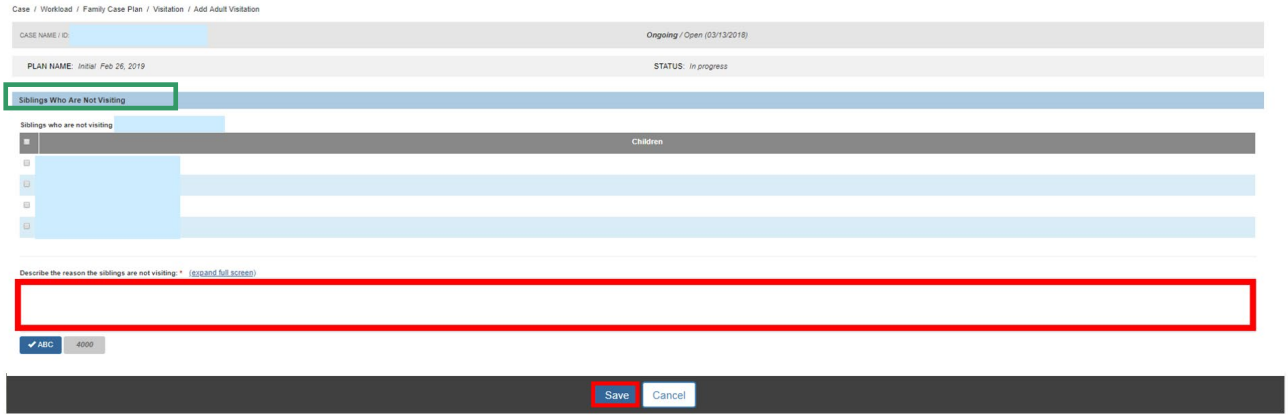
Note: The **Actions** dropdown includes **Add/Modify Details**, **View Activity** and **Delete Plan Details**. Please refer to the Adult Visitation Plan section of how to complete.

1. If applicable, make a selection from the **Child not visiting** drop-down menu and click, **Add Non-Visiting Sibling Detail**.



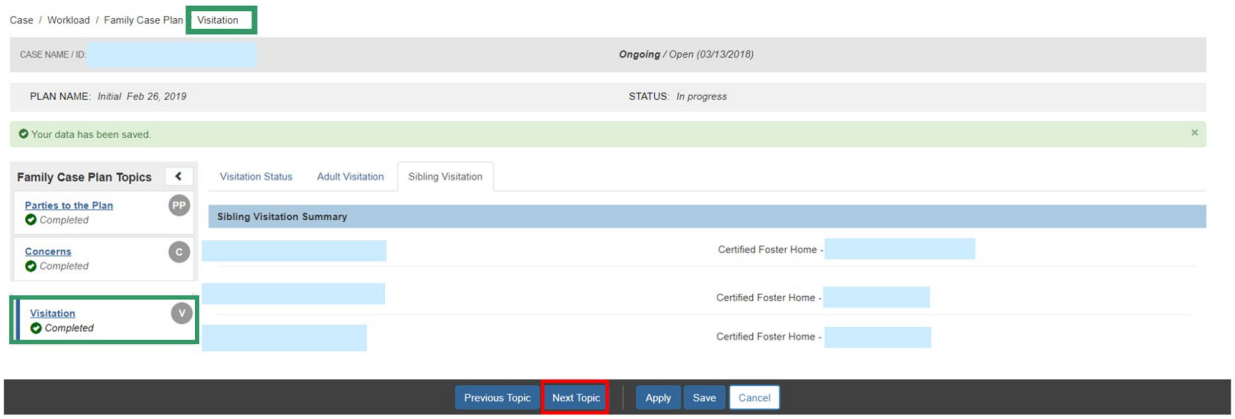
The **Siblings Who Are Not Visiting** grid appears.

1. Make selection from **Siblings who are not visiting** child and enter narrative in the response to **Describe the reason the siblings are not visiting**.
2. Click, **Save**.

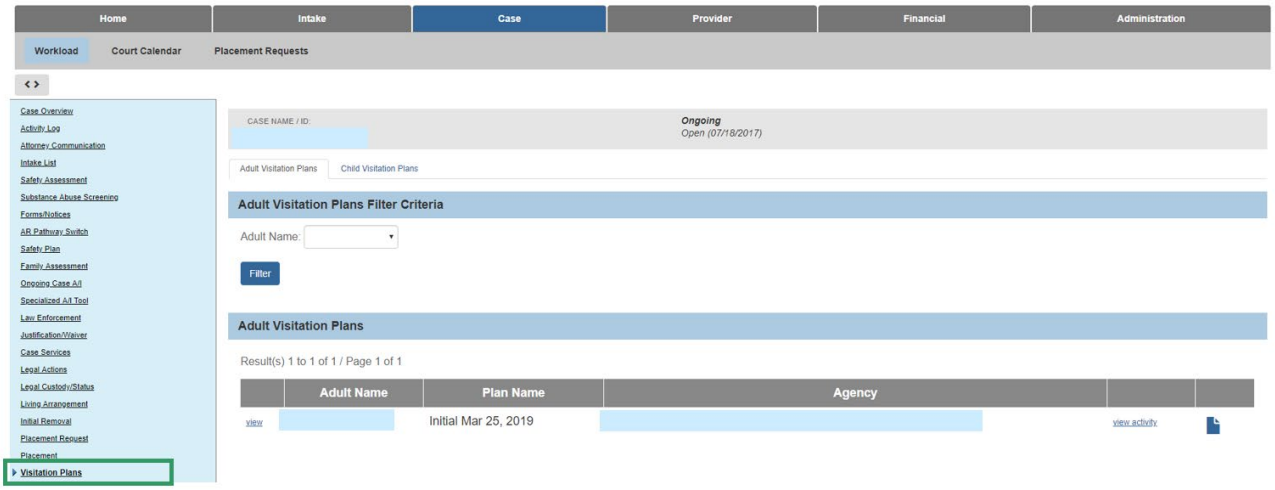


The **Visitation** screen appears, displaying a **Completed** status for the **Visitation** topic.

1. Click, **Next Topic**.



Important: When you click, **Visitation Plans** in the left navigation pane, the **Adult Visitation Plans** tab screen appears. The visitation plans listed on this page are view only and include the Adult Visitation Plans created within the Family Case Plan. The **Child Visitation Plans** tab includes a view only list of historical visitation plans.



Completing the Sibling Visitation

(this section is missing)

Completing the Foster Youth Rights Handbook Topic

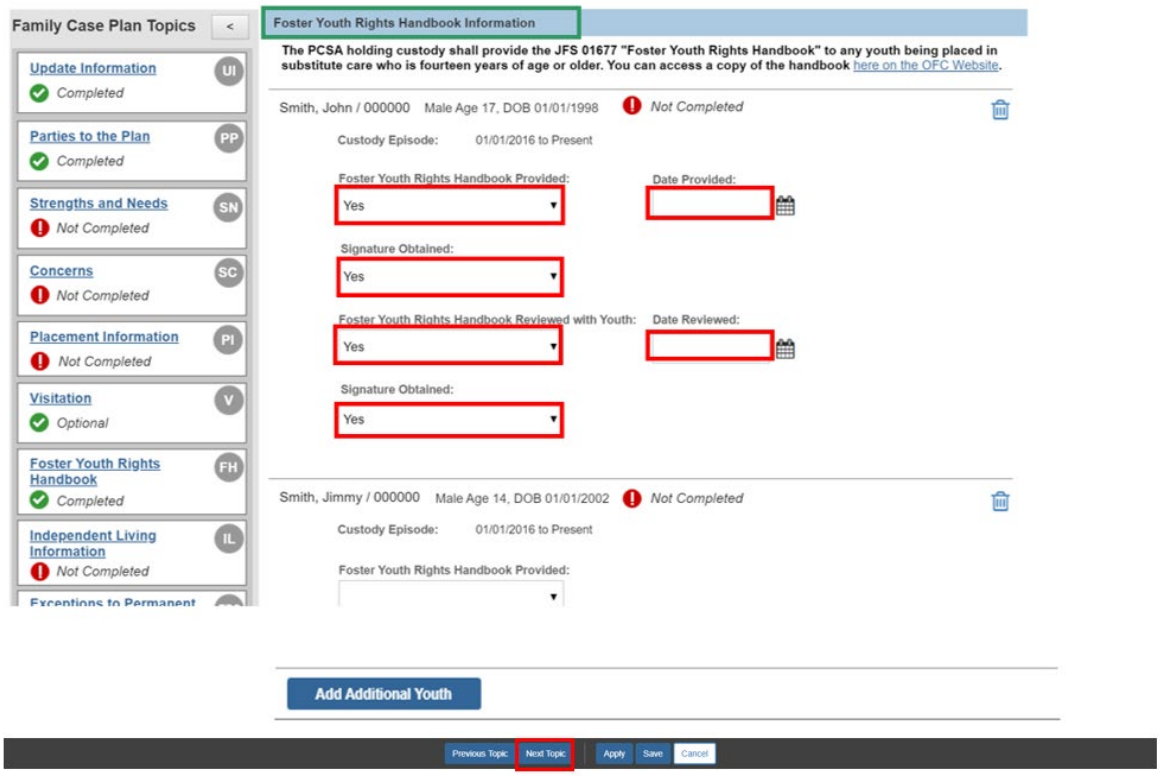
Note: The Foster Youth Rights Handbook topic displays when at least one child case plan participant has a non-end-dated Legal Custody Episode. Children who are 14 years of age or older will display. To add children under the age of 14, the **Add Additional Youth** button is available.

The **Foster Youth Rights Handbook Information** screen appears.

Note: The PCSA holding custody shall provide the JFS 01677, Foster Youth Rights Handbook, to any youth being placed in substitute care who is fourteen years of age or older. You can access a copy of the handbook here on the OFC Website.

1. Make a selection from the **Foster Youth Rights Handbook Provided** dropdown. If Yes is selected, enter **Date Provided**.

   Note: If No-Youth incapacitated is selected from **Foster Youth Rights Handbook Provided,** no other questions will display.
2. Make a selection from **Signature Obtained** dropdown menu.
3. Make a selection from the **Foster Youth Rights Handbook Reviewed with Youth** dropdown. If Yes is selected, enter **Date Provided**.
4. Make a selection from **Signature Obtained** dropdown menu.
5. Make a selection from the **Signature Obtained** drop-down menu.
6. Make a selection from the **Foster Youth Rights Handbook Reviewed with Youth** drop-down menu.
7. If the Handbook was reviewed, enter the **Date Reviewed**.
8. Make a selection from the Signature Obtained drop-down menu.
9. Click, **Next Topic**.



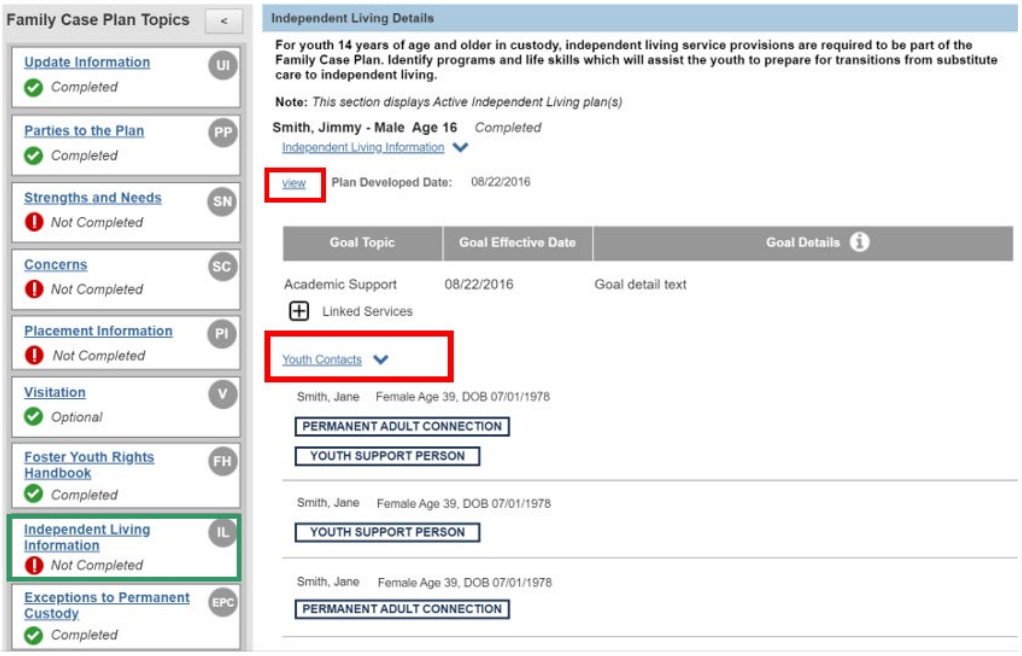
The **Independent Living Information** screen appears.

Completing the Independent Living Family Topic

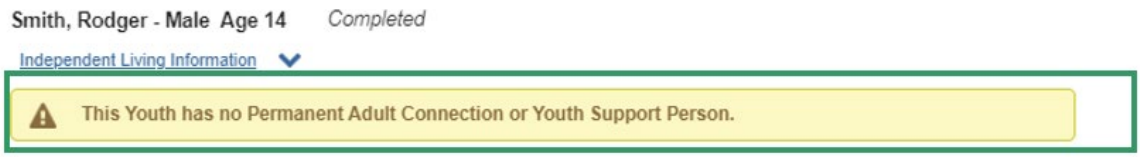
Note: The Independent Living Information topic displays when:

- At least one child case plan participant is 14 years of age or older and has a non-end-dated Legal Custody Episode
- At least one child case plan participant younger than 14 years of age has an Active Independent Living Plan.
- At least one child case plan participant has a case plan goal or concurrent plan objective of Independent Living / Emancipation.

1. When a child has an Active Independent Living Plan, click **view**; to be navigated to the child's Independent Living Plan.
2. Click the **Youth Contacts** drawer to expand its contents. All persons identified in Youth Contacts within their Active Independent Living Plan will display.

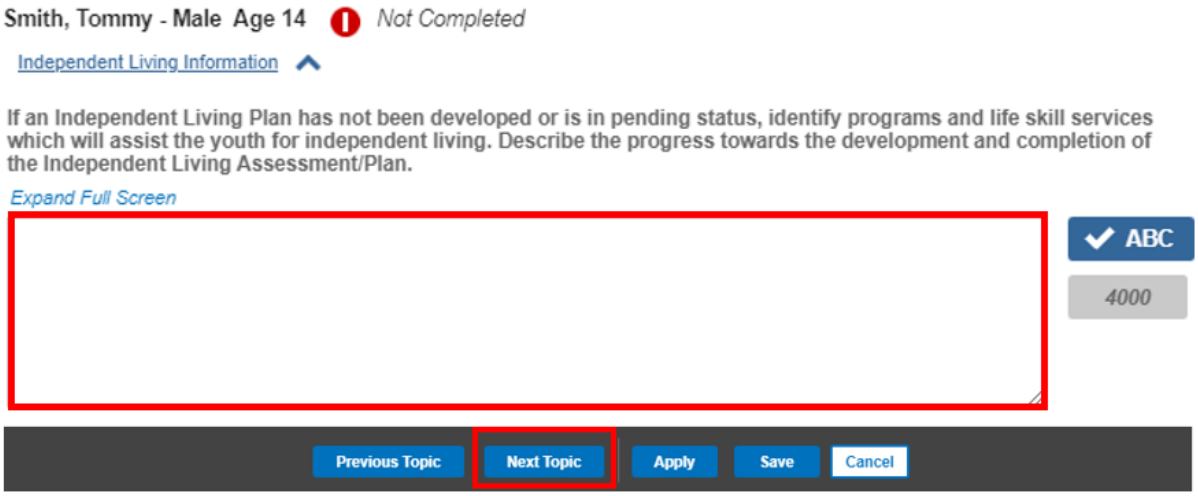


Note: If the youth does not have anyone identified as either a Permanent Adult Connection or Youth Support Person, a warning message will display. The Permanent Adult Connections and Youth Support Persons are recorded in the Contact Directory within the Independent Living Plan.

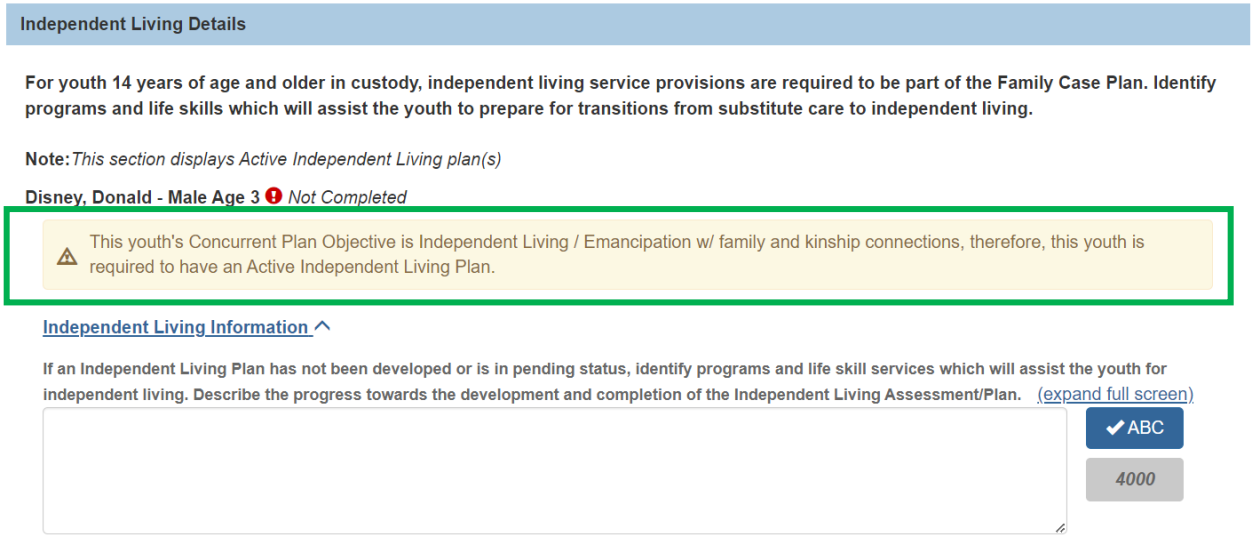


When a youth does not have an Active Independent Living Plan, enter narrative in response to: **If an Independent Living Plan has not been developed or is in pending status, identify programs and life skill services which will assist the youth for independent living. Describe the progress towards the development and completion of the Independent Living Assessment/Plan.**

3. Click, **Next Topic**.



Note: If the child case plan participant has a Concurrent Plan Objective of Independent Living / Emancipation and does not have an Active Independent Living Plan, the system will display the Attention message.



The **Exceptions to Permanent Custody** screen appears.

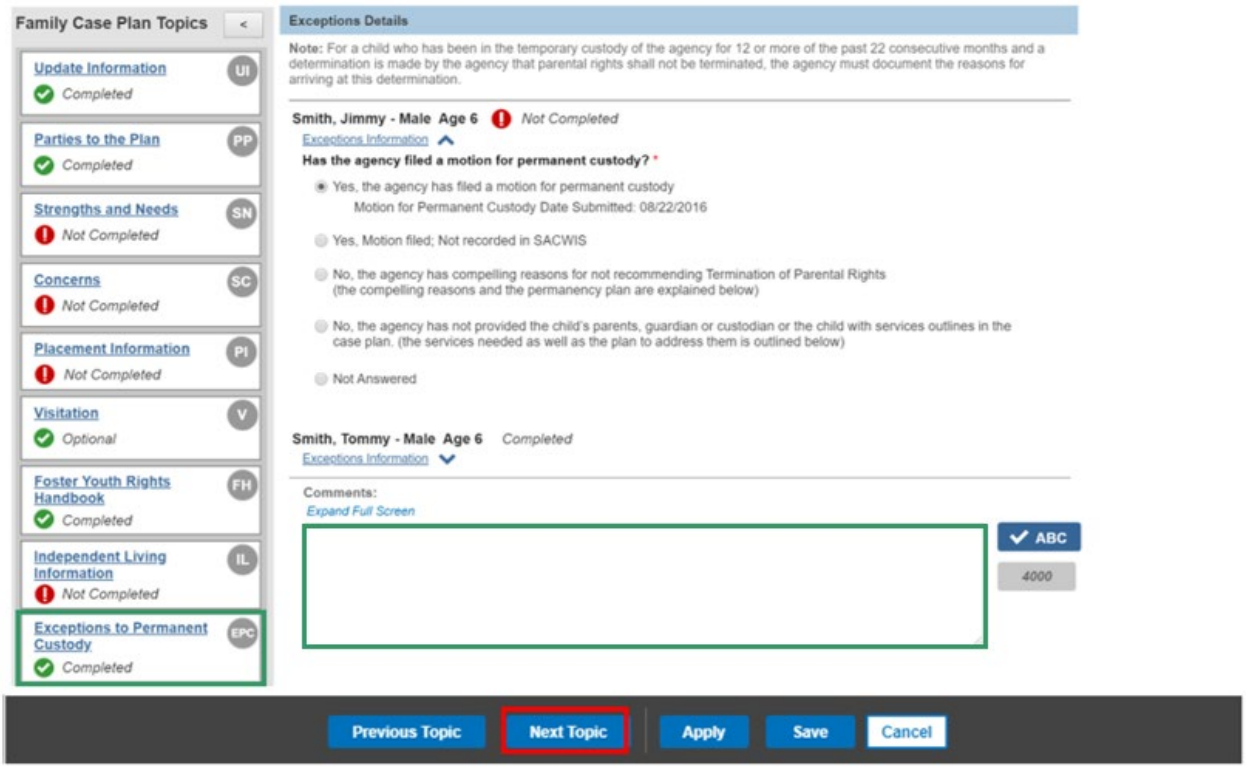
Completing the Exceptions to Permanent Custody Topic

Note: The Exceptions to Permanent Custody topic displays when at least one child case plan participant has been in custody for 12 or more of the last 22 months. For unapproved Family Case Plans, the 22-month time frame will be based on system date. For approved Family Case Plans, the system will display this topic if any Exceptions Information has been recorded. The 12-month custody period does not have to be consecutive and can be across multiple legal custody episodes.

1. Click the **Exception Information** drawer to expand its contents.
2. Select the relevant response to the question, **Has the agency filed a motion for permanent custody?**

   Note: If a Motion for Permanent Custody is recorded in Ohio SACWIS, the system will default the answer to **Yes, the agency has filed a motion for permanent custody** with the **Date Submitted** displayed on the screen. Sheri – add the additional radio…add missing text

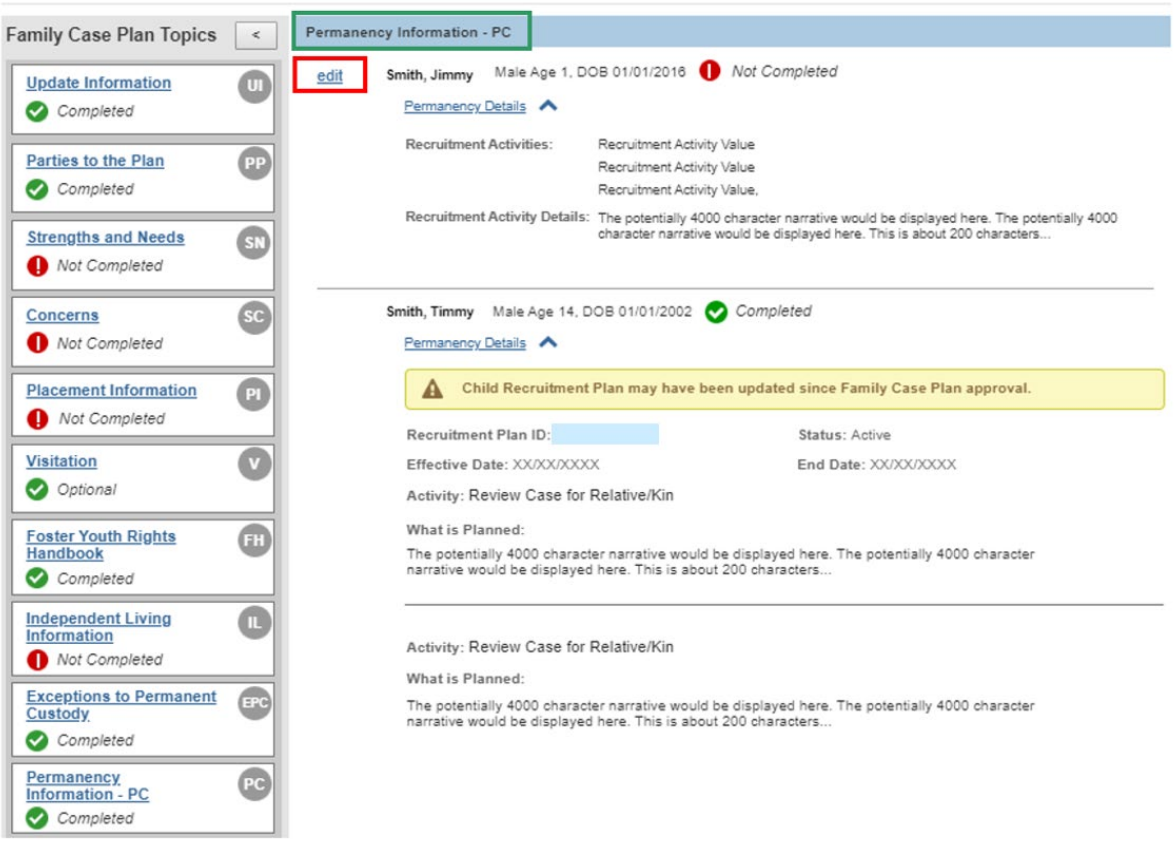
   When the response is, **Yes, Motion filed; Not recorded in Ohio SACWIS**, you will need to add narrative in response to, **Document the compelling reasons for determining the Termination of Parental Rights would not be in the interest of the child.**
3. When **No, the agency has compelling reasons for not recommending Termination of Parental Rights (the compelling reasons and the permanency plan are explained below)** is selected, a narrative in response to **Document the compelling reasons for determining the Termination of Parental Rights would not be in the interest of the child** is required**.**
4. When **No, the agency has not provided the child's parents, guardian or custodian or the child with services outlined in the case plan (the services needed as well as the plan to address them is outlined below)** is selected, a narrative response to **Document the reason for determining that the Termination of Parental Rights shall not be pursued because the agency has not provided the child's parent, guardian, or custodian or the child with services outlined in the family case plan which were deemed necessary for the safe return of the child to the child's home** is required.
5. If applicable, enter narrative in the **Comments** text box.
6. Click, **Next Topic**.



Completing the Permanency Information - PC Topic

Note: The **Permanency Information – PC** topic displays when at least one child case plan participant has a non-end-dated Permanent Custody or Permanent Surrender Legal Status.

1. If a child does not have a Recruitment Plan recorded in Ohio SACWIS, an **edit** link will display next to the child. Click, **edit**.

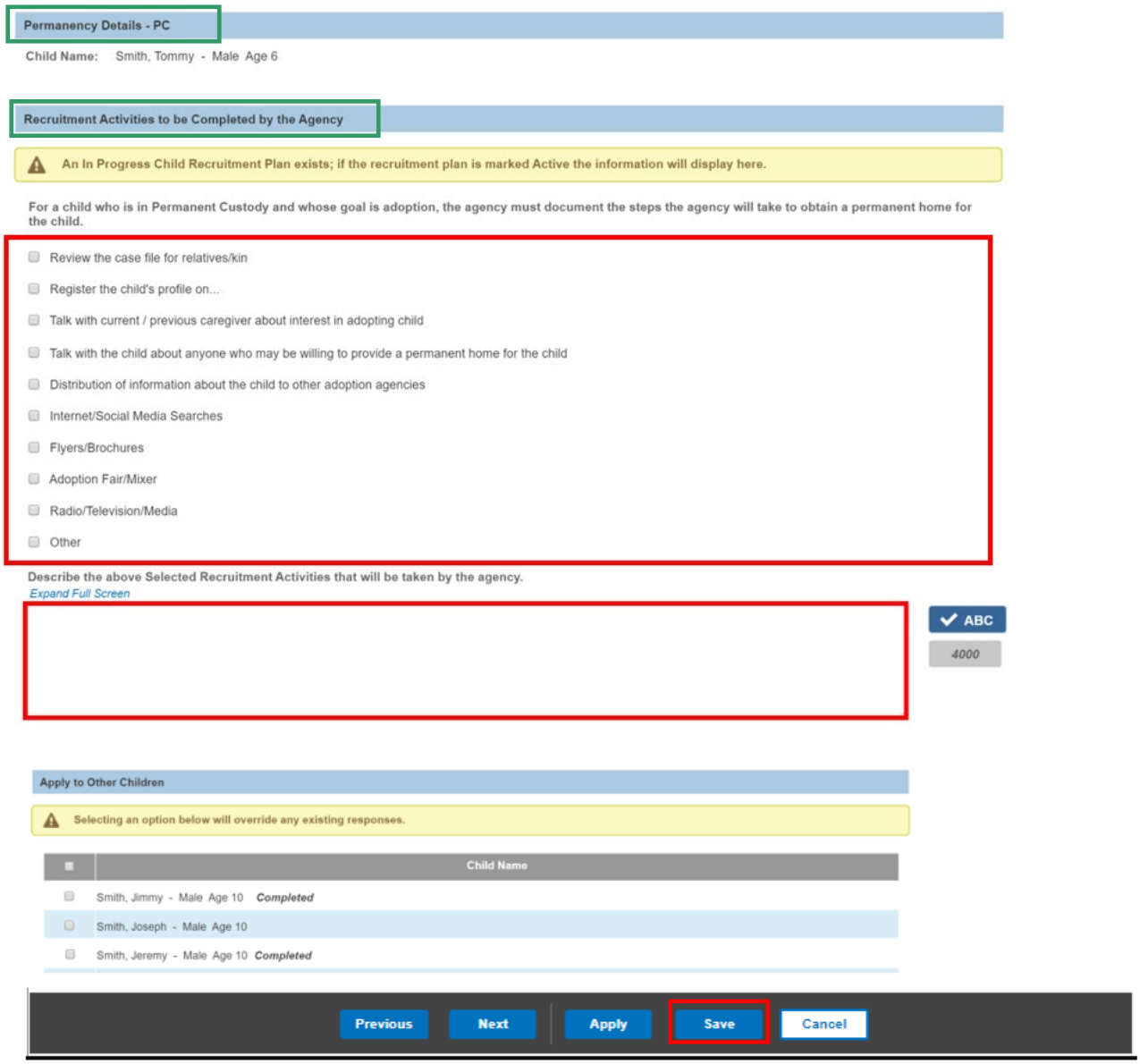


2. The **Permanency Details – PC** page appears.

Completing the Permanency Details - PC Page

1. In the **Recruitment Activities to be Completed by the Agency** grid, make a selection(s) by placing a checkmark(s) in the check box(es) beside each of the recruitment activities you wish to add.
2. Enter narrative in the text box **Describe the above Selected Recruitment Activities that will be taken by the agency.**

   Note: You can **Apply to Other Children**. If there is a recruitment plan linked, the Apply to Other Children is grayed out.
3. Click, **Save**.



The **Permanency Information-PC** screen appears.

Note: The system will display/link the most recent Child Recruitment Plan (with a status of active, complete or closed only).

4. Click the **Permanency Details** drawer to expand its contents.
5. If you click, **Recruitment Plan ID** link, you will be navigated to that Child Recruitment Plan.
6. Click, **Next Topic**.

Family Case Plan Topics

- Update Information (UI) — Completed
- Parties to the Plan (PP) — Completed
- Strengths and Needs (SN) — Not Completed
- Concerns (SC) — Not Completed
- Placement Information (PI) — Not Completed
- Visitation (V) — Optional
- Foster Youth Rights Handbook (FH) — Completed
- Independent Living Information (IL) — Not Completed
- Exceptions to Permanent Custody (EPC) — Completed
- Permanency Information - PC (PC) — Completed
- Permanency Information - PPLA (PPLA) — Completed
- Candidate For Foster Care (FC) — Completed
- Court and Signatures (CS)
- Approval (A)

Permanency Information - PC

edit

Smith, Jimmy Male Age 1, DOB 01/01/2016 Not Completed

Permanency Details

Recruitment Activities: Recruitment Activity Value
Recruitment Activity Value
Recruitment Activity Value.

Recruitment Activity Details: The potentially 4000 character narrative would be displayed here. The potentially 4000 character narrative would be displayed here. This is about 200 characters...

Smith, Timmy Male Age 14, DOB 01/01/2002 Completed

Permanency Details

Child Recruitment Plan may have been updated since Family Case Plan approval.

Recruitment Plan ID: Status: Active

Effective Date: XX/XX/XXXX End Date: XX/XX/XXXX

Activity: Review Case for Relative/Kin

What is Planned:
The potentially 4000 character narrative would be displayed here. The potentially 4000 character narrative would be displayed here. This is about 200 characters...

Activity: Review Case for Relative/Kin

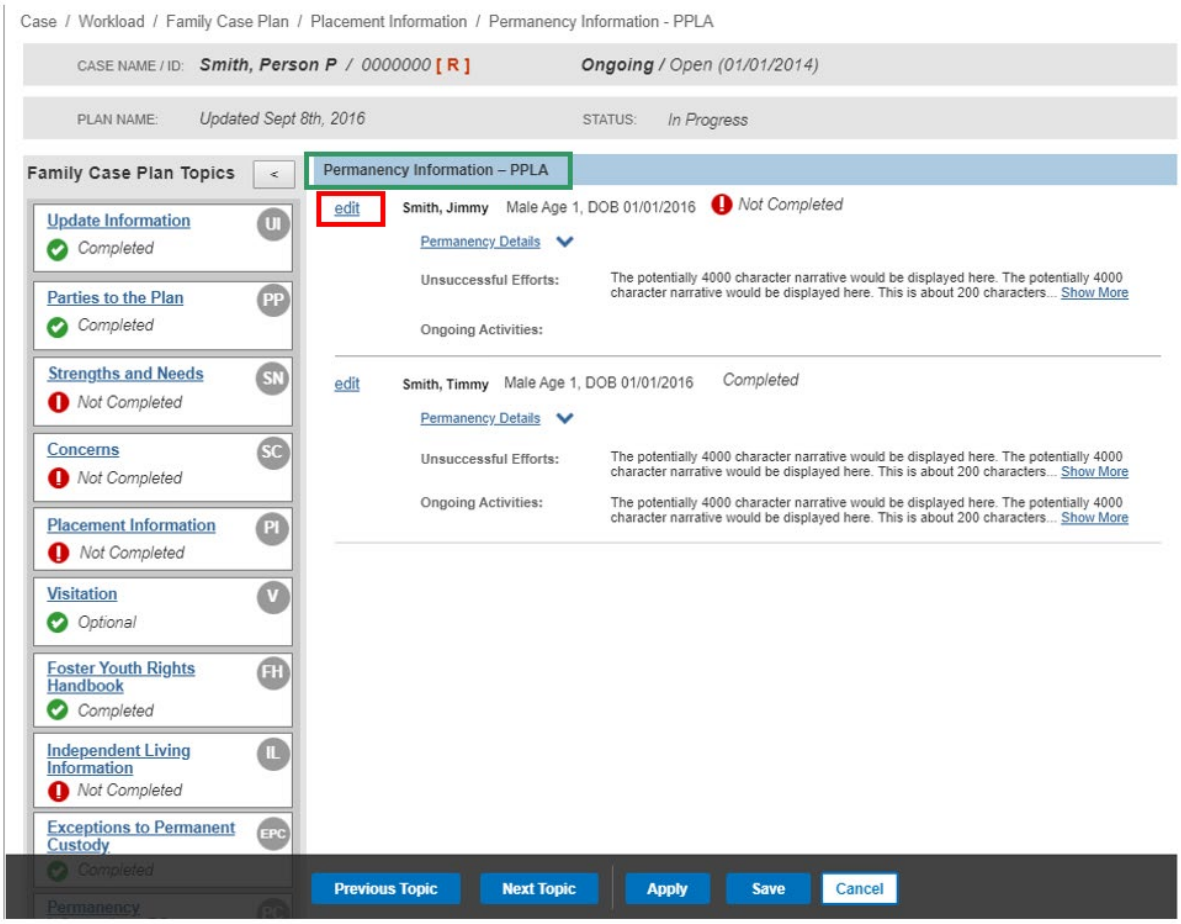
What is Planned:
The potentially 4000 character narrative would be displayed here. The potentially 4000 character narrative would be displayed here. This is about 200 characters...

Previous Topic | Next Topic | Apply | Save | Cancel

Completing the Permanency Information - PPLA Topic

Note: The **Permanency Information – PPLA** topic displays when at least one child case plan participant has a non-end-dated PPLA Legal Status.

1. Click, **edit** next to the child's name.



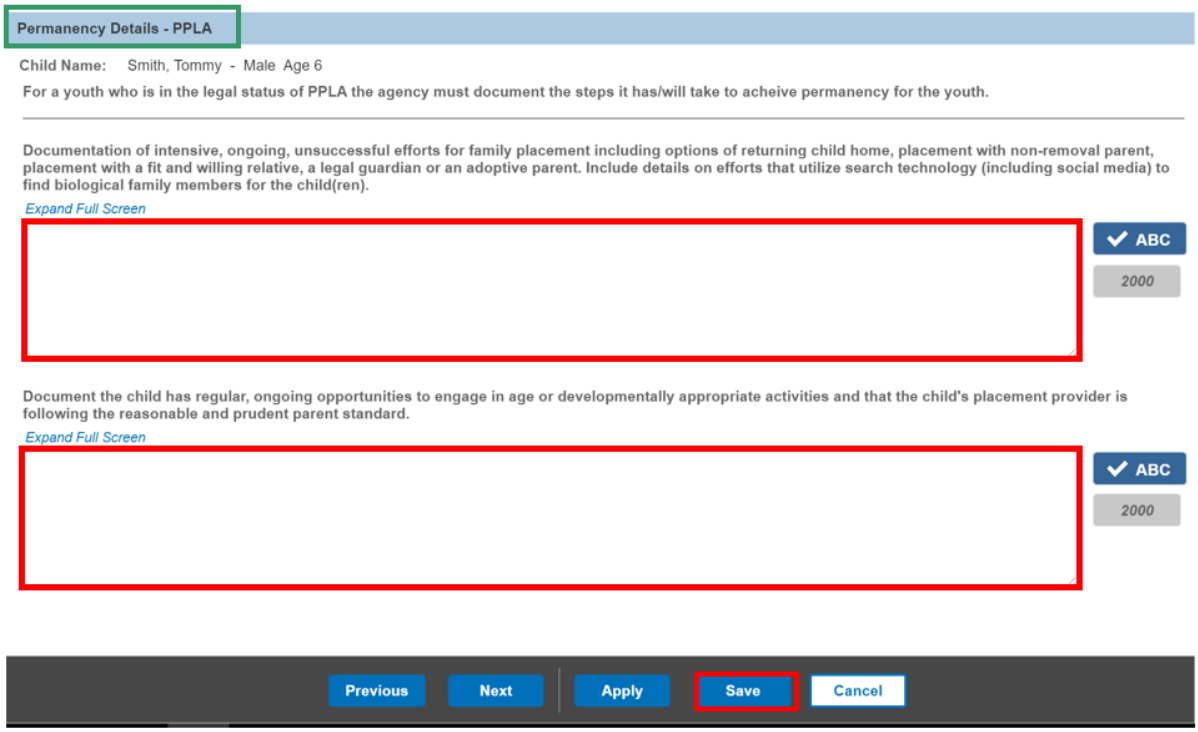
The **Permanency Details – PPLA** grid appears.

Completing the Permanency Details - PPLA Page

1. Enter narrative in the text box **Documentation of intensive, ongoing, unsuccessful efforts for family placement including options of returning child home, placement with non-removal parent, placement with a fit and willing relative, a legal guardian or an adoptive parent. Include details on efforts that utilize search technology (including social media) to find biological family members for the child(ren).**
2. Enter narrative in the text box **Document the child has regular, ongoing opportunities to engage in age or developmentally appropriate activities and**

that the child's placement provider is following the reasonable and prudent parent standard.

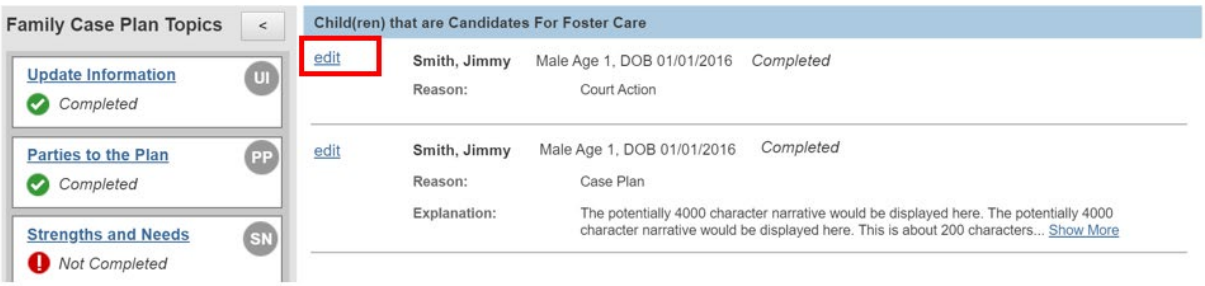
3. Click, **Save.**
4. The **Permanency Information – PPLA page** appears. Click, **Next Topic.**



Completing the Candidate For Foster Care Topic

Note: The Candidate for Foster Care topic displays when at least one child case plan participant is not in the custody of the agency

1. Click, **edit** next to the child's name.



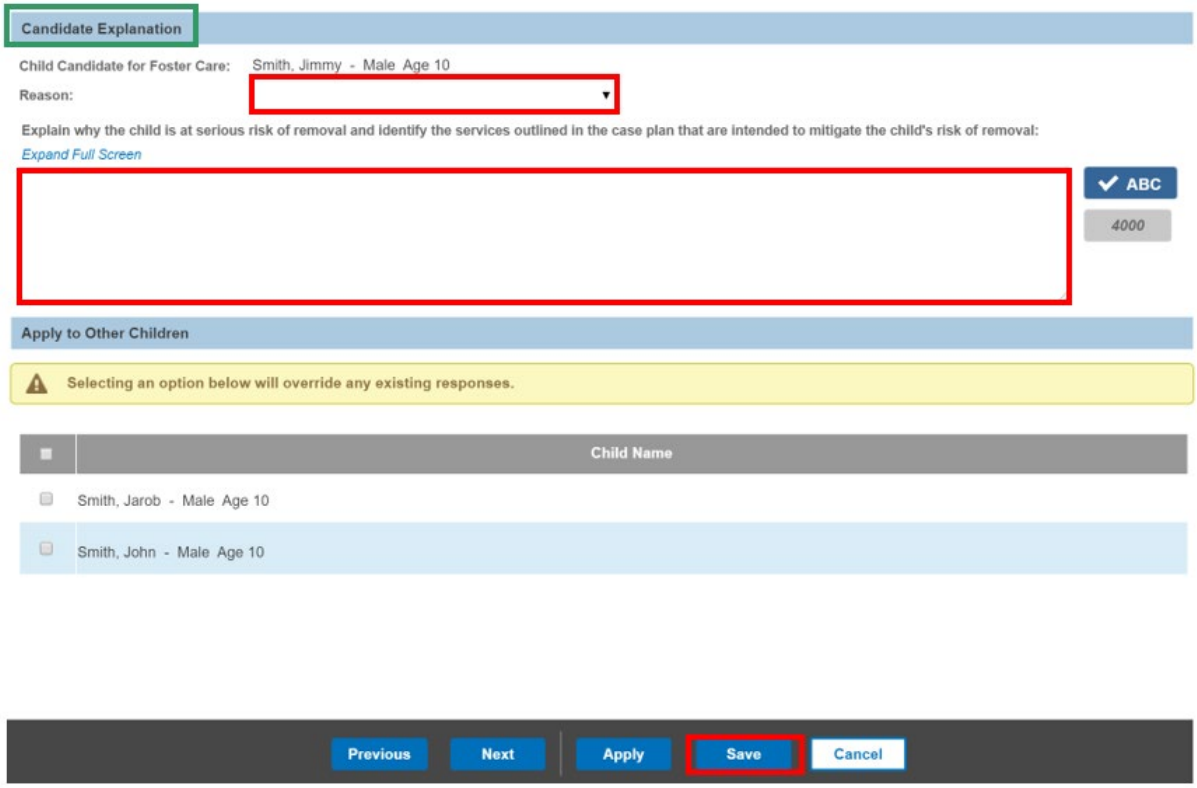
The **Candidate Explanation** page appears.

2. Make a selection from the **Reason** dropdown.

3. Enter narrative in the text box **Explain why the child is at serious risk of removal and identify the services outlined in the Family Case Plan that are intended to mitigate the child's risk of removal.**

   Note: You can **Apply to Other Children.**

5. Click, **Save.**
6. The **Candidate For Foster Care** page appears. Click, **Next Topic.**



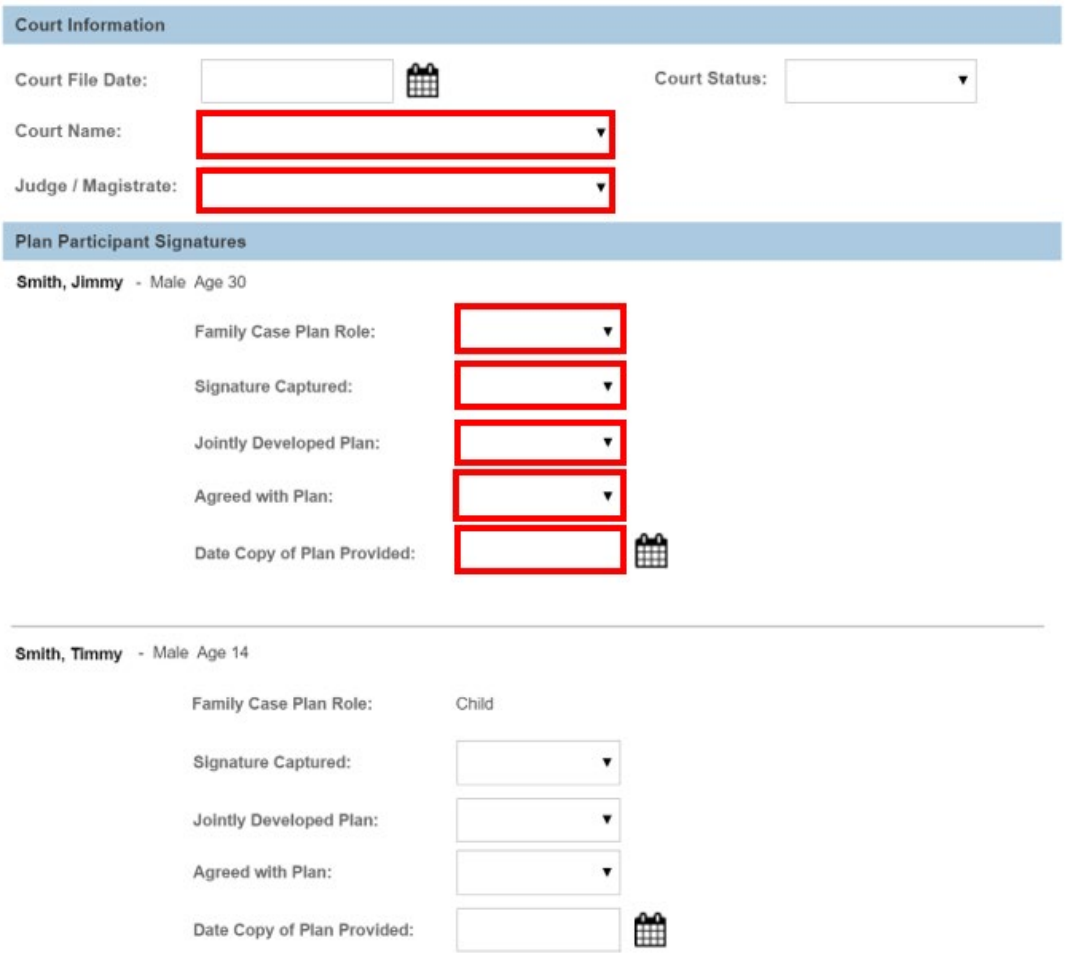
Completing the Court and Signatures Topic

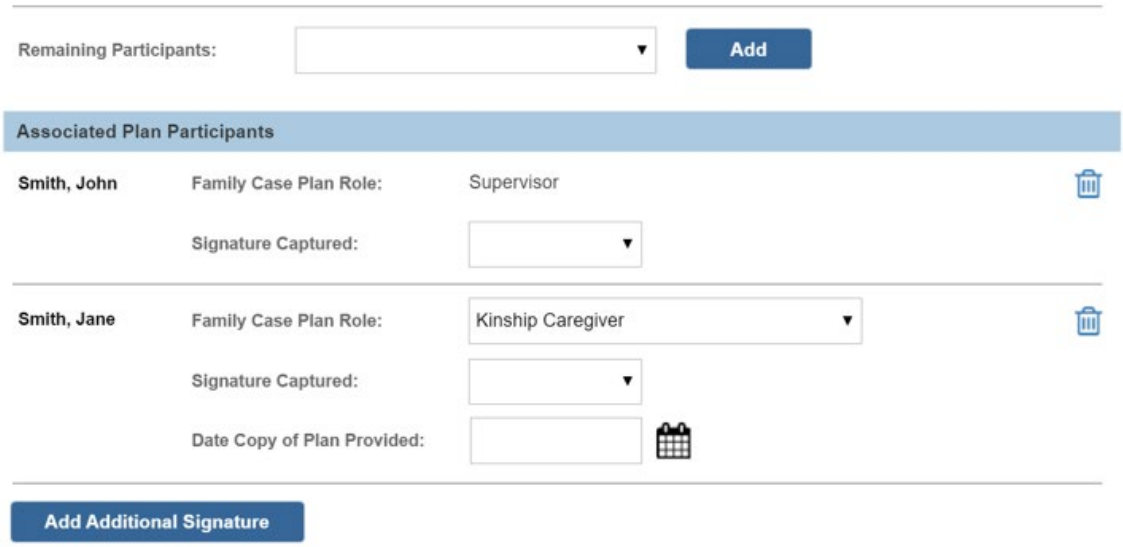
1. Make a selection from the **Court Name** drop-down menu.
2. Make a selection from the **Judge/Magistrate** drop-down menu.
3. In the **Plan Participant Signatures** grid, for every participant in the Family Case Plan, complete the following:
   - **Family Case Plan Role**
   - **Signature Captured** (If the answer is **No,** select, **Reason Not Captured** from the dropdown menu)
   - **Captured Date**
   - **Jointly Developed Plan** (If the answer is **No,** enter narrative in the **Explain** textbox)
   - **Agreed with Plan** (If the answer is **No,** enter narrative in the **Explain** textbox)

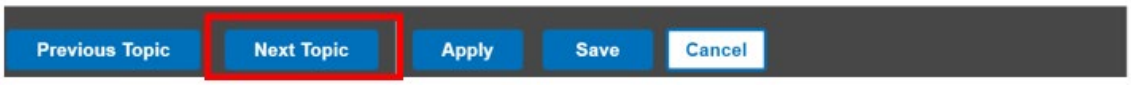
- **Date Copy of Plan Provided**

4. In the **Associated Plan Participants** grid, complete the following for each person:
   - **Family Case Plan Role**
   - **Signature Captured**
   - **Captured Date**

   Note: If necessary, click, **Add Additional Signature**. The **Additional Signatures** screen will appear; from there, make a selection from the **Available Persons** grid by placing a checkmark in the check box beside the relevant name. You have the option to search for a person if they do not appear in the Available Persons grid.
5. Click, **Next Topic**.





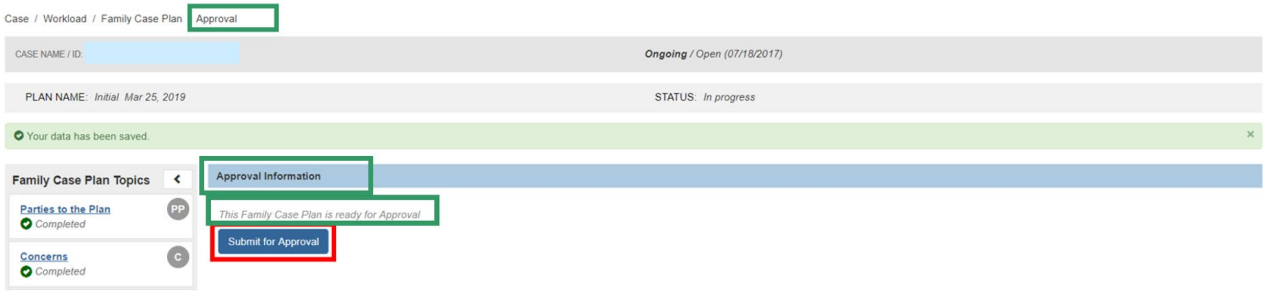


Processing Approval

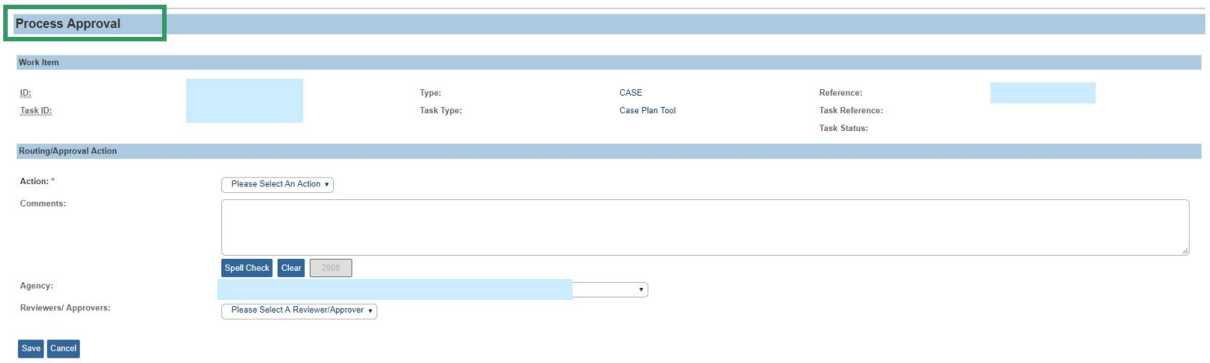
The **Approval** screen appears, displaying the **Approval Information** grid.

If everything has been correctly completed, the following message will display: ***This Family Case Plan is ready for Approval***.

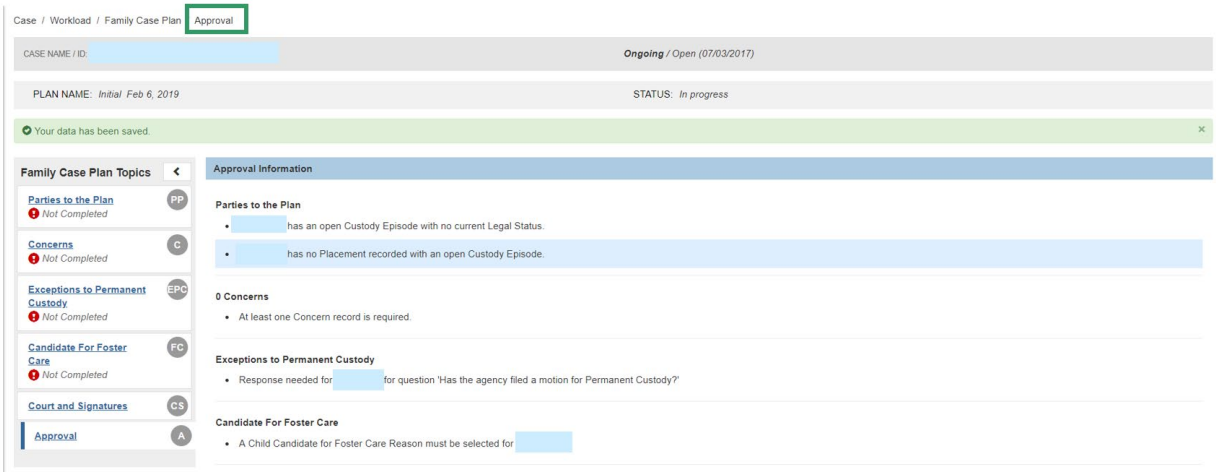
Click, Submit for Approval.



The **Process Approval** screen appears.

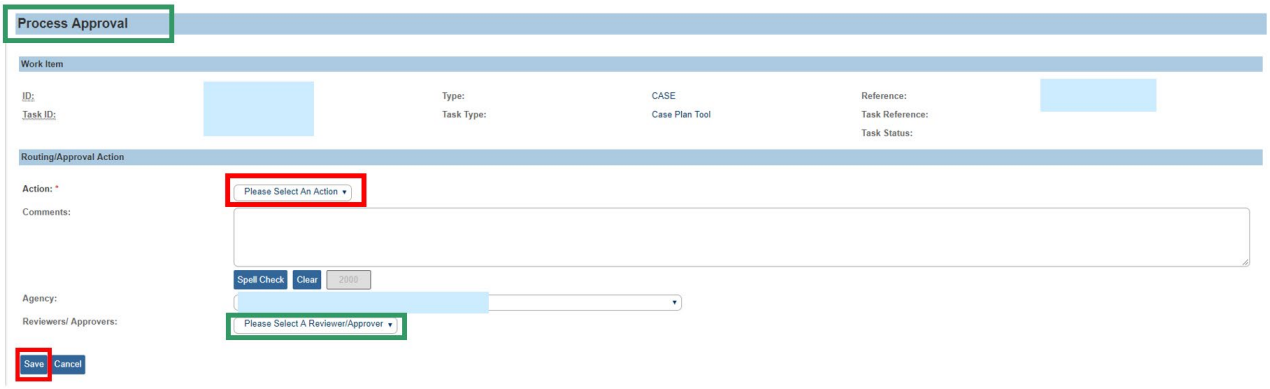


If you have failed to complete any required information for the Family Case Plan, the **Approval** screen will appear with a list of the incomplete items; you will need to resolve the issues before you can submit the Plan for approval.

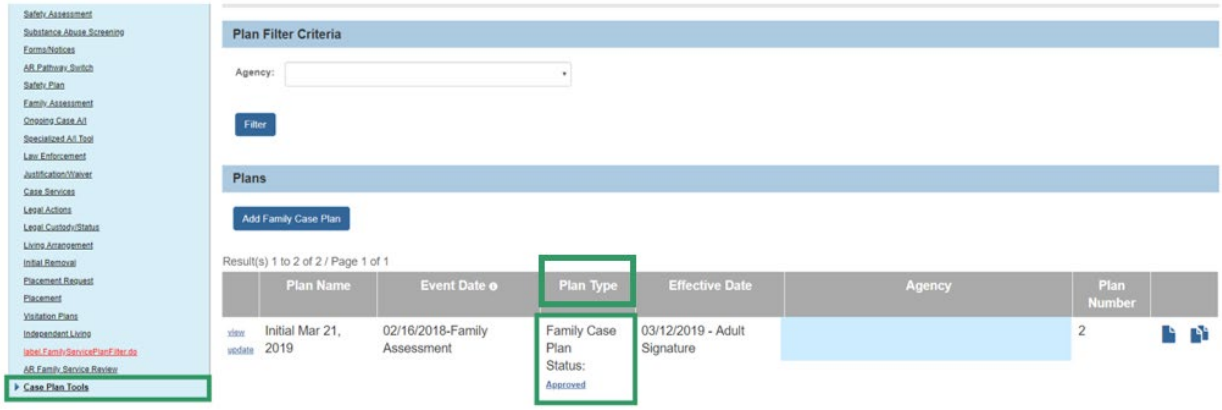


If all requirements for the Family Case Plan have been completed, the **Process Approval** screen appears.

1. Make a selection from the **Action** drop-down menu.
2. If you do not have approval access rights, make a selection from the **Reviewers/Approvers** drop-down menu.
3. Click, **Save**.



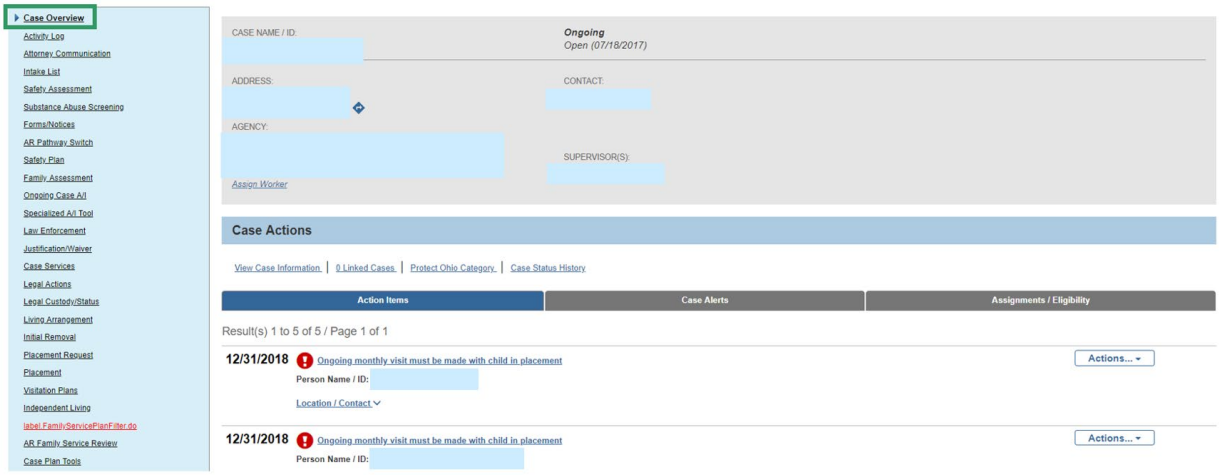
The **Case Plan Tools** screen appears, displaying **Approved** under **Family Case Plan Status** in the **Plan Type** column.



Completing an Update to the Family Case Plan

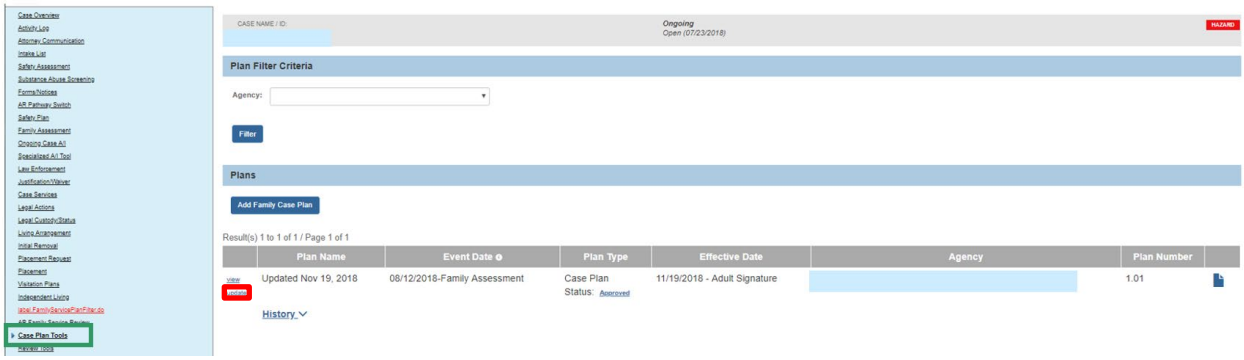
From the Ohio SACWIS home screen:

1. Navigate to the **Case Overview** screen.
2. Click, **Case Plan Tools** in the navigation pane.



The **Case Plan Tools** screen appears.

3. Click, **Update**.

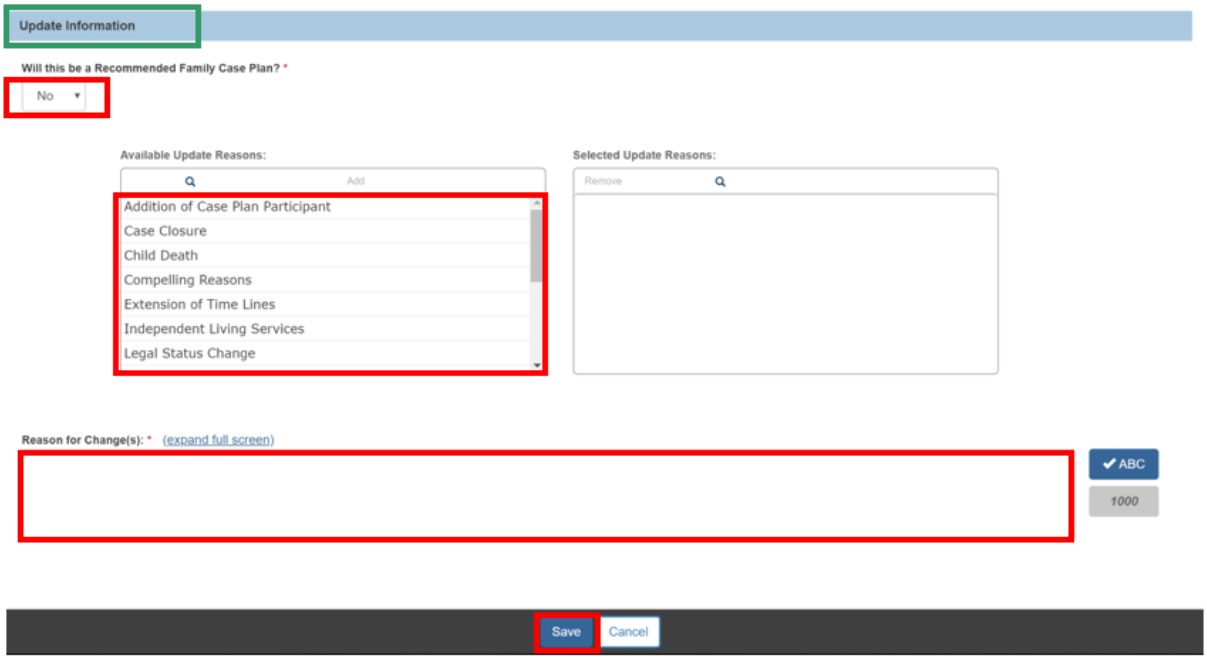


The **Update Information** grid appears.

1. Make a selection from **Will this be a Recommended Family Case Plan?** dropdown.

   Note: If **No** is selected, the **Available Update Reasons** push box is displayed. Make a selection(s).

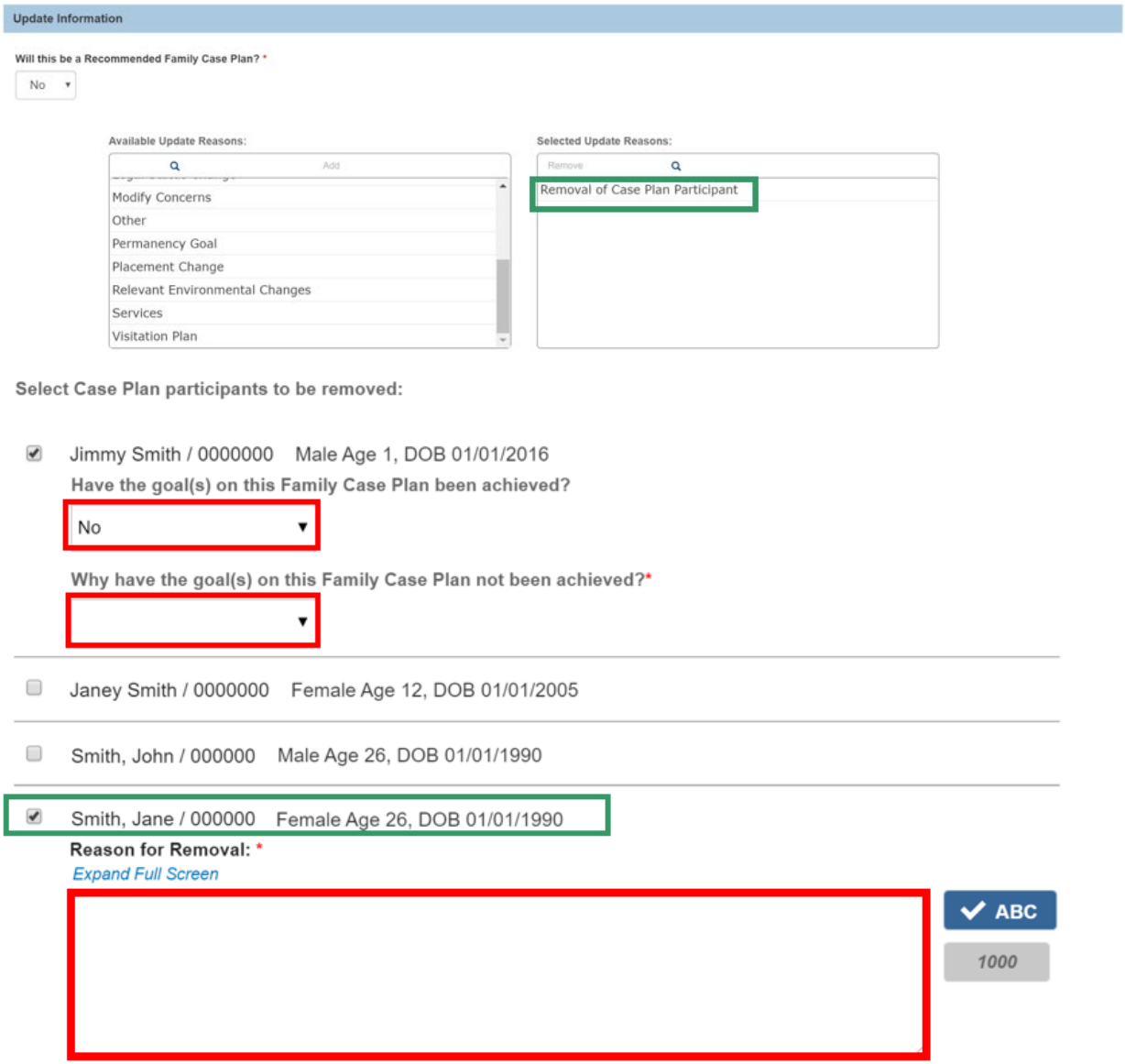
2. Enter narrative in the textbox **Reason for Change(s).**
3. Click, **Save**.



4. When the selection of **Removal of Case Plan Participant** from the **Available Update Reasons** push box is made, a list of case plan participants will display. Place a checkmark in the check box beside the name of the person you want to be removed.
5. If you select a child to be removed, the **Have the goal(s) on this Family Case Plan been achieved?** A drop-down menu will appear; Select **Yes/No.**

   If **No** is selected, the **Why have the goal(s) on this Family Case Plan not been achieved?** drop-down menu will appear. Make a selection.

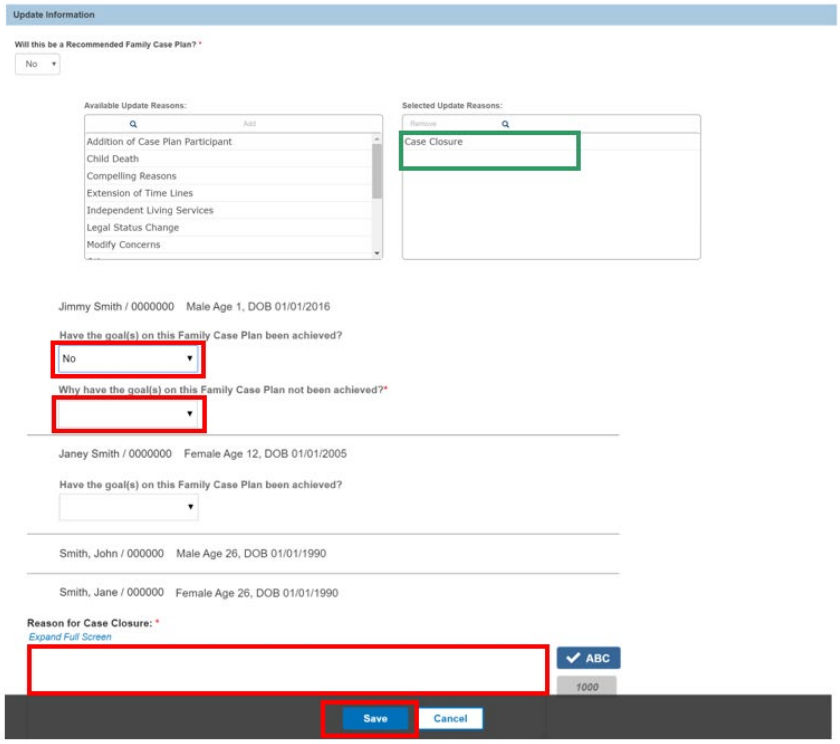
6. If you select an adult to be removed, enter narrative in the textbox **Reason for Removal.**
7. Click, **Save**.



8. When the selection of **Case Closure** from the **Available Update Reasons** push box is made, a list of case plan participants will display.

Note: If Case Closure is selected as an Update Reason, no other Update Reason can be selected.

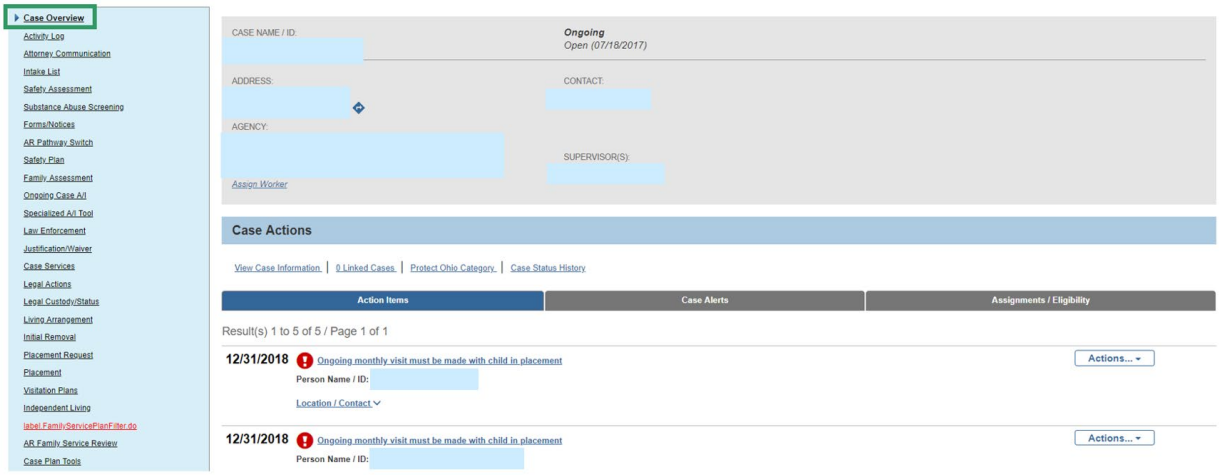
9. **Have the goal(s) on this Family Case Plan been achieved?** dropdown appears next to each child case plan participant. Make a selection of **Yes/No.**
    a. If **No** is selected, **Why have the goal(s) on this Family Case Plan not been achieved?** dropdown appears. Make a selection.
10. Enter narrative in the textbox **Reason for Case Closure.**
11. Click, **Save**.



Completing a Recommended for PC Family Case Plan

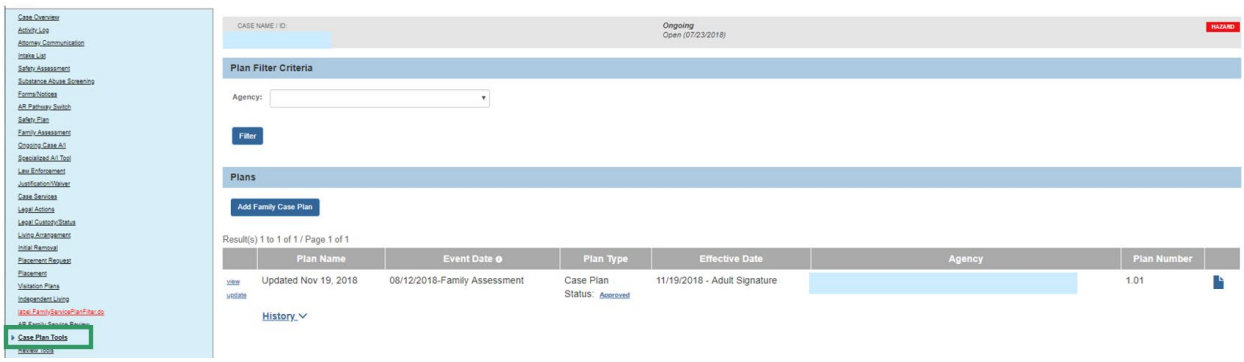
From the Ohio SACWIS home screen:

1. Navigate to the **Case Overview** screen.
2. Click, **Case Plan Tools** in the navigation pane.



The **Case Plan Tools** screen appears.

3. Click, **Update**.

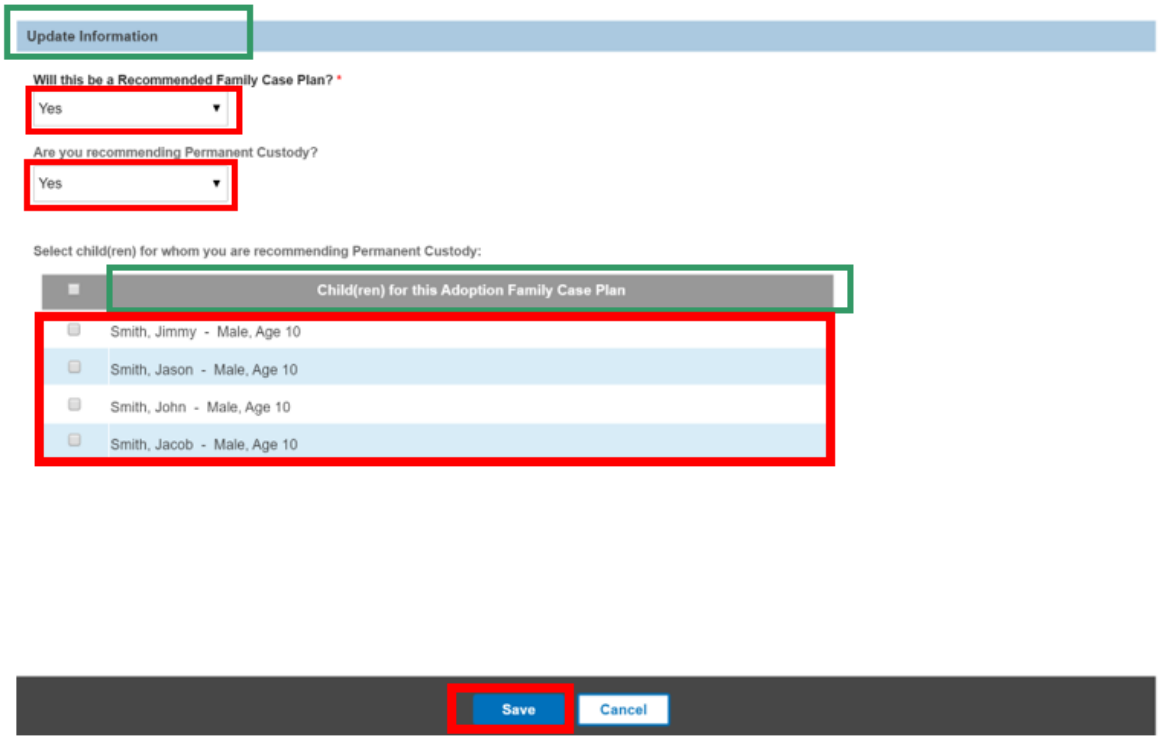


The **Update Information** grid appears.

4. Select **Yes** from **Will this be a Recommended Family Case Plan?** dropdown.
5. Select **Yes** from **Are you recommending Permanent Custody?** dropdown**.**
6. **Select child(ren) for whom you are recommending Permanent Custody** from the **Children for this Adoption Family Case Plan** grid.
7. Click, **Save.**

The **Parties to the Plan** screen appears.

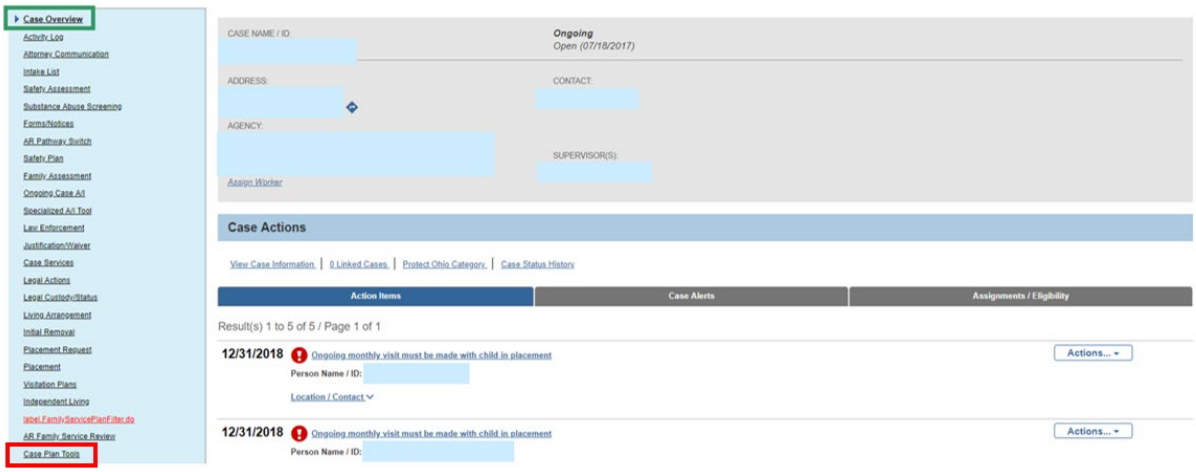
1. **Complete the FCP using steps previously discussed.**



Completing a Recommended Family Case Plan

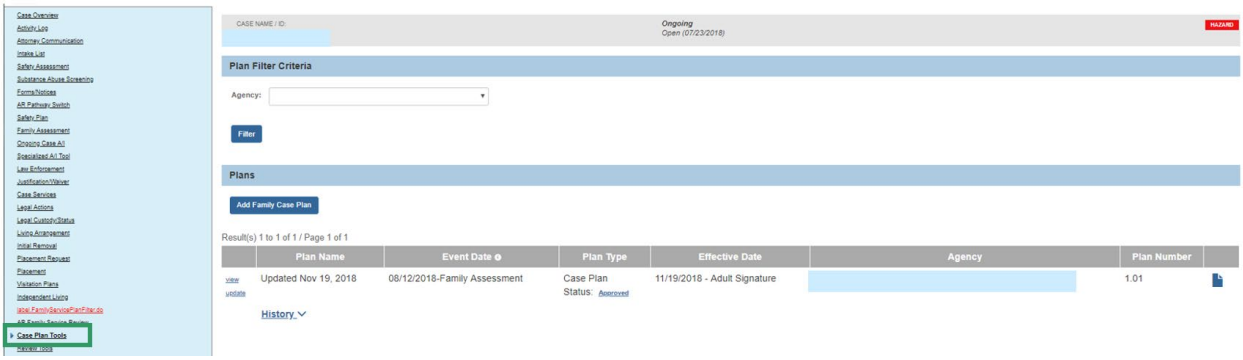
From the Ohio SACWIS home screen

1. Navigate to the **Case Overview** screen.
2. Click, **Case Plan Tools** in the navigation pane.



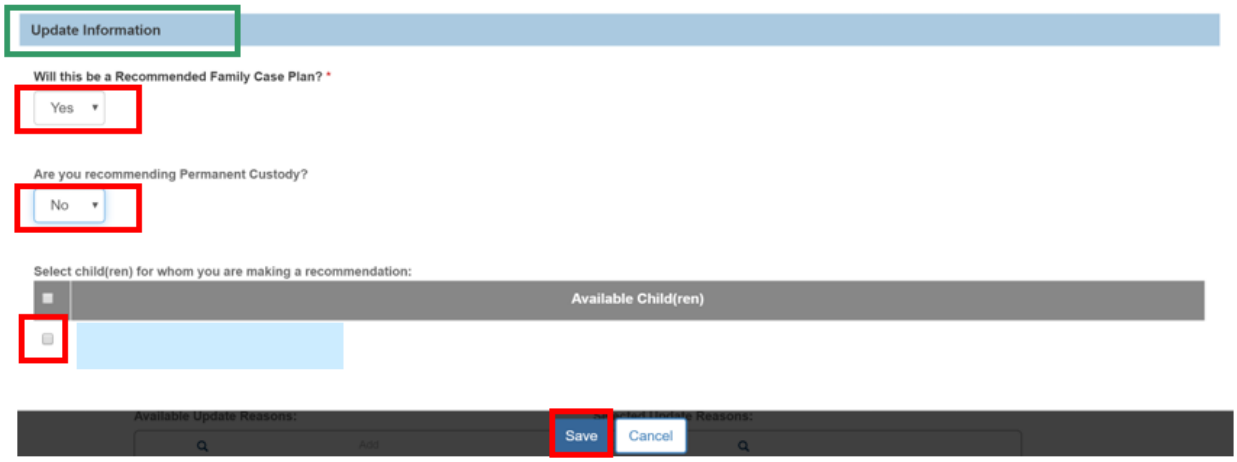
The **Case Plan Tools** screen appears.

3. Click, **Update**.



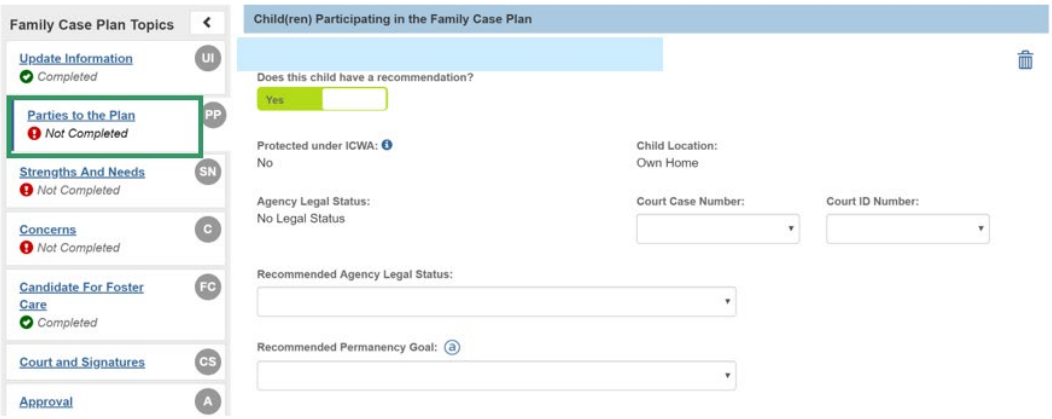
The **Update Information** grid appears.

4. Select **Yes** from **Will this be a Recommended Family Case Plan?** dropdown.
5. Select **No** from **Are you recommending Permanent Custody?** dropdown**.**
6. **Select child(ren) for whom you are making a recommendation:** from the **Available Child(ren)** grid.
7. Click, **Save.**



The **Parties to the Plan** screen appears with the Recommended green badge displaying under the child for whom you are making a recommendation**.**

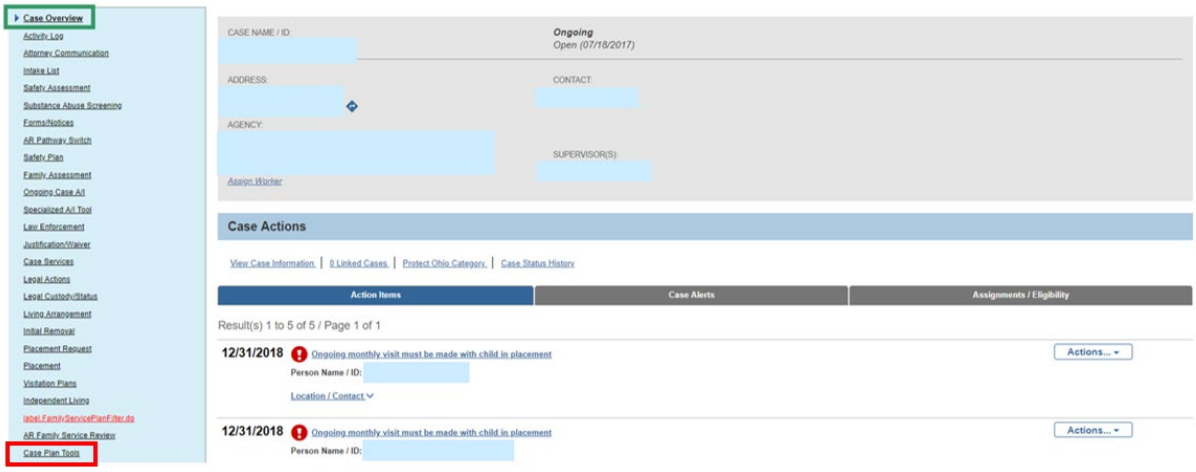
8. Make a selection from the **Recommended Agency Legal Status** drop-down menu.
9. Make a selection from the **Recommended Permanency Goal** drop-down menu.
10. Complete the remainder of the Recommended Family Case Plan with the same instructions listed above.



Revising a Recommended Family Case Plan

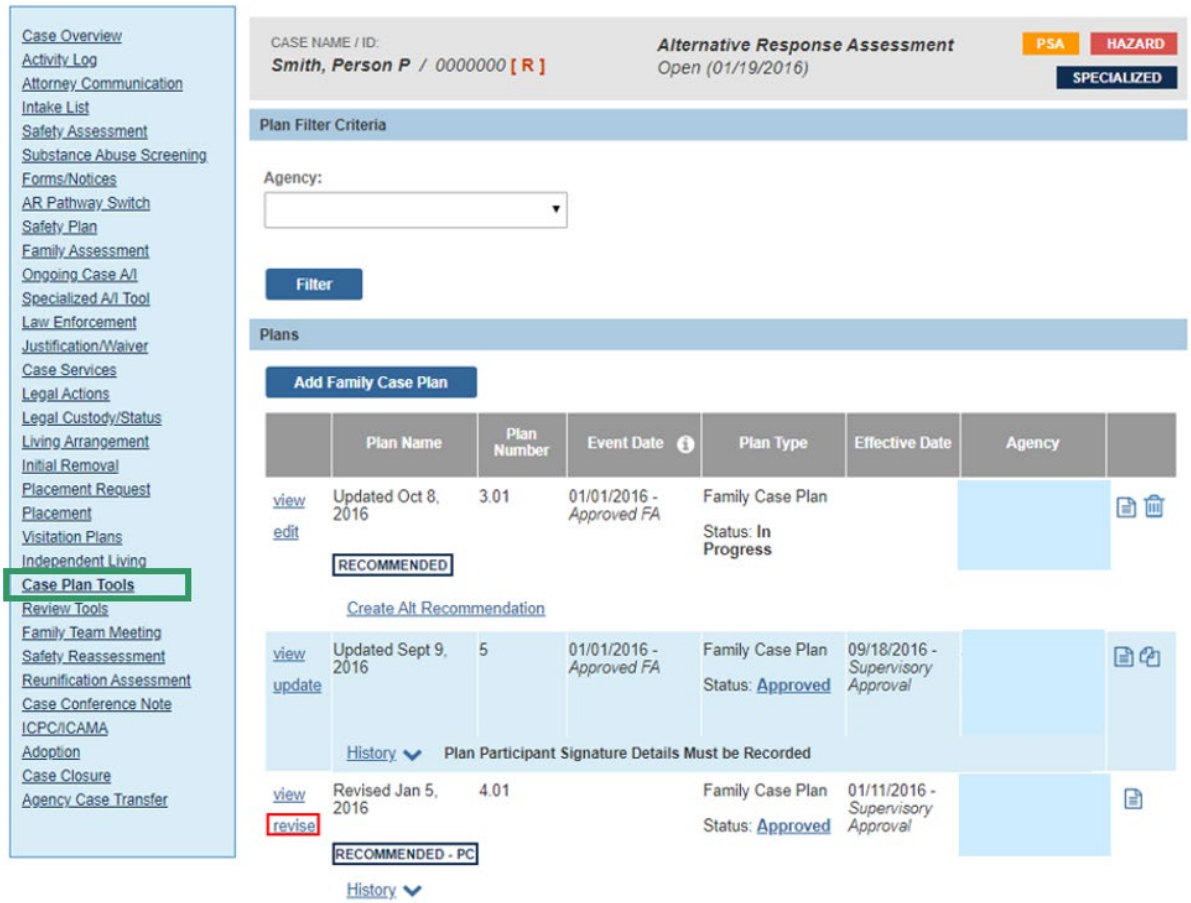
From the Ohio SACWIS home screen

1. Navigate to the **Case Overview** screen.
2. Click, **Case Plan Tools** in the navigation pane.



The **Case Plan Tools** screen appears.

3. Click, **Revise** next to the Recommended Plan.



The **Update Information** grid appears.

Note: The Revise link will create an In Progress copy of the selected Approved Recommended Family Case Plan. The plan number will be the next sequential number in the minor series from the selected Approved Recommended Family Case Plan.

- On the Update Information screen, the Recommended and Recommended PC questions will not display on a revised plan.
- The system will copy the Update Information screen into the In Progress Revision.
- The Court and Signature information does not copy into a revised plan.
- The system will not display the Update Information screen on a Recommended PC Family Case Plan.

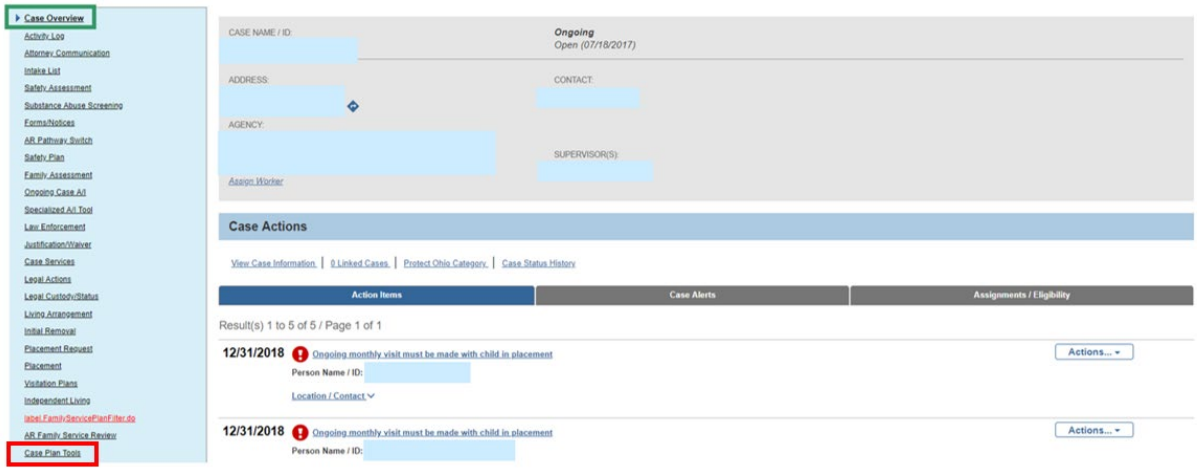
When a Recommended Family Case Plan is revised, the system will set the Court Status to Not Applicable on the plan that is being revised.

If the Revised Recommended Family Case Plan is deleted, the system will reopen the prior Recommended Family Case Plan, thereby clearing out the Court Status and Court Status Date.

Finalizing a Recommended Family Case Plan

From the Ohio SACWIS home screen

1. Navigate to the **Case Overview** screen.
2. Click, **Case Plan Tools** in the navigation pane.

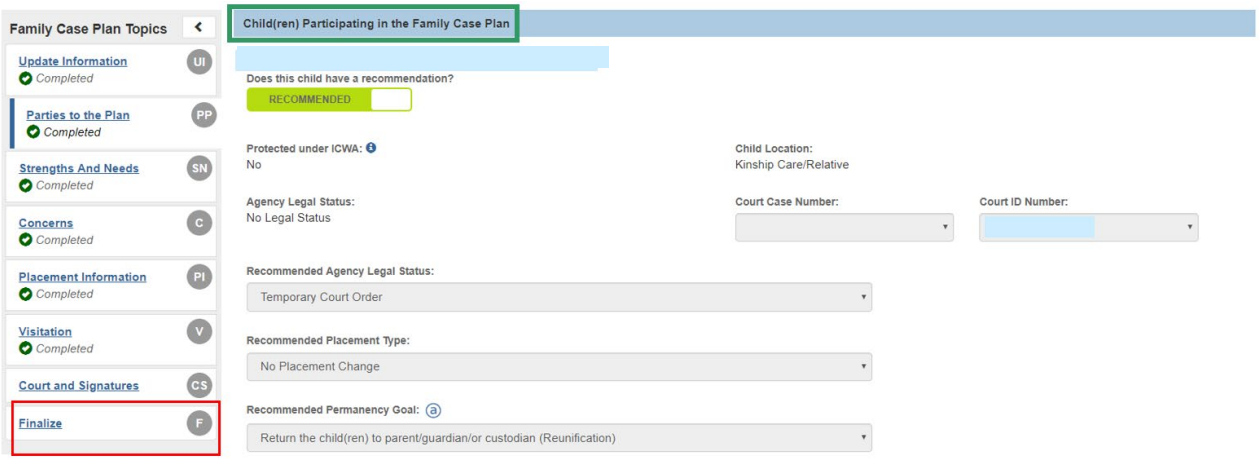


The **Case Plan Tools** screen appears.

3. Click, **view** next to the Approved Recommended Plan.

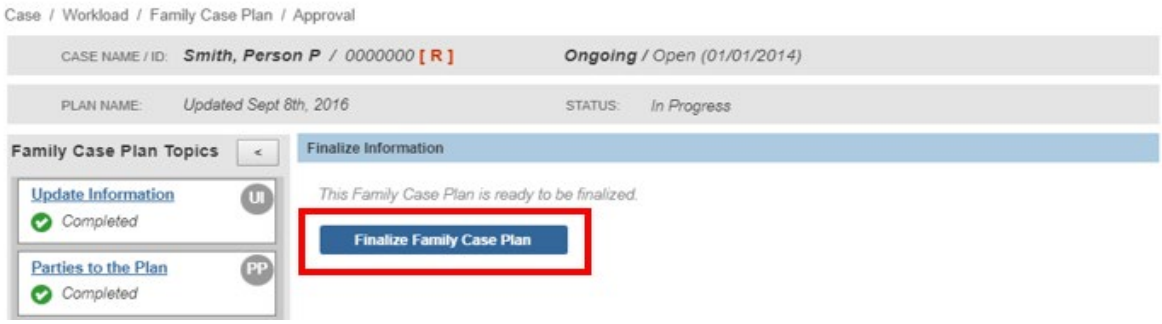
The **Child(ren) Participating in the Case Plan** screen appears.

4. Click the **Finalize** Topic.



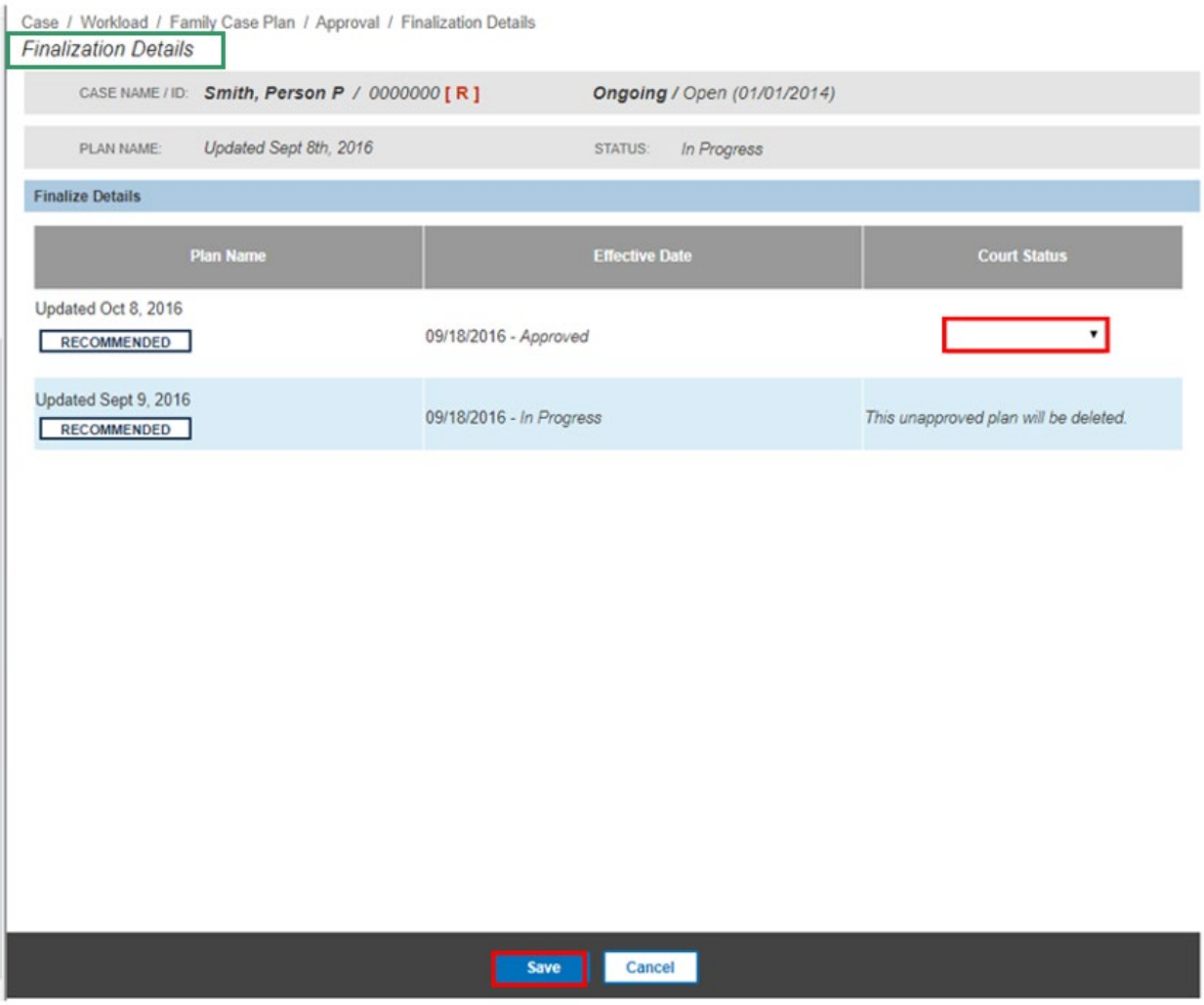
The **Finalize Information** screen appears.

5. Click, **Finalize Family Case Plan.**



The **Finalization Details** screen appears.

1. Make a selection from the **Court Status** drop-down menu.
2. Click, **Save**.



For additional information about the SAR, please refer to the Knowledge Base Article **Recording a Semi-Annual Administrative Review**.

If you need additional information or assistance, please contact the Automated Systems Help Desk at: sacwis_help_desk@jfs.ohio.gov