# Updating a Family Case Plan



# Knowledge Base Article

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## Overview

This Knowledge Base Article reviews how to update a Family Case Plan within the Ohio SACWIS system.

Open cases can have only one **Initial Case Plan** per agency.

**Note:** The only exception to this is if a court has ordered multiple **Case Plans** for the same case.

The **Initial Case Plan** may be edited if it is in '**In Progress**' status. A **Case Plan** in '**Approved**' status cannot be edited.

Once an **Initial Case Plan** has been completed and approved, a **Case Plan Amendment** is required in order to make changes to the case plan. **Case Plan Amendments** account for changes in **Case Services**, **Placement**, and **Visitation**. The case plan should also be amended to document **Case Closure** as well as any other significant changes to the case plan.

To create a **Case Plan Amendment**, complete the following steps:

## Navigating to the Case Plan

1. From the Ohio SACWIS **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Select the appropriate **Case ID** link.

**Note:** If you know the **Case ID** number, you can also use the **Search** link at the top of the **Home** screen and navigate to the **Case Overview** screen.



The **Case Overview** screen appears it.

4. Click the **Case Plan Tools** link in the **Navigation** menu.

| Potential Adoptive Families | Action Items | Case Alerts | Dashboard | Assignments / Eligibility |
|---|---|---|---|---|
| Child Recruitment | Result(s) 1 to 15 of 26 / Page 1 of 2 | | | |
| Pre-Adoptive Staffing/Matching Conference | | | | |
| Child Location/ICCA | | | | |
| Residential Treatment Information | | | | |
| Independent Living | | | | |
| Case Plan Tools | | | | |
| Visitation Plans | | | | |

The **Case Plan Filter Criteria** screen appears.

## Updating the Family Case Plan Information

On the **Case Plan Filter Criteria** screen in the **Case Plans** section lists the available **Case Plans**. When the **Status** is **Approved**, the plan will have an **Update** link.

Note: Adoption Family Case Plan(s) with the Plan Name / Approval Date prior to the Adoption Case creation date were copied from the Original Case.

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

| | Plan Name | Plan Number | Plan Type | Effective Date | Agency | |
|---|---|---|---|---|---|---|
| view update | Updated | 1.03 | Adoption Family Case Plan  Status: **Approved** | 07/30/2024 - Supervisory Approval | Test County Children Services Board | |
| History ⌄ | | | | | | |

**Add Family Case Plan**

Note: The **Plan Number** is an incremented decimal that is based on the original **Case Plan Number**.

The system copies the information from the original **Case Plan** to this **Amended Case Plan** record, and then changes the **Case Plan Type** to **Amended**.

1. Click the **Update** link below the case plan that needs amended.

The **Update Information** screen appears.

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2. Make a selection from the dropdown menu for, **Will this be a Recommended Family Case Plan?**

| CASE NAME / ID: | Sacwis, Susie / 123456 | | *Adoption* / *Open (04/03/2024)* |
|---|---|---|---|
| **PLAN NAME:** | | **STATUS:** | |

**Update Information**

**Will this be a Recommended Family Case Plan?** *

*Selecting **No** creates an Update to the current Family Case Plan.*

*Selecting **Yes** will maintain the current Family Case Plan AND create an alternative Family Case Plan for the agency to recommend a different legal status, Child Location and/or visitation arrangement.*

*The approved Family Case Plan is effective until the court orders the Recommended Plan.*

[          ⌄]

The screen expands.

3. From the **Available Update Reasons**, make the appropriate selections.
   - Hold down the **Ctrl** key to highlight multiple selections.
   - Use the **Add** button to move the reasons to the **Selected Update Reasons** box.

4. Enter narrative into the **Reason for Changes** textbox.

5. Click the **Save** button.

[No  ⌄]

**Available Update Reasons:**

| 🔍 | Add |

Concurrent Plan
Extension of Time Lines
Independent Living Services
KGAP
Legal Status Change

**Selected Update Reasons:**

| Remove | 🔍 |

**Reason for Change(s):** * (expand full screen)

[                                                                    ]  ✔ ABC
                                                                        *10000*

[ Save ]  [ Cancel ]

The **Family Case Plan Topics** screen appears, defaulting the **Parties to the Plan Topic** screen.

## Completing the Family Case Plan Topics

**Note:** If the **Case Plan Change Reason** is **Case Closure**, skip the next two steps.

| | |
|---|---|
| CASE NAME / ID:  **Sacwis, Susie** /123456 | *Adoption* / Open (04/03/2024) |
| PLAN NAME:  *Updated  Apr 3, 2024* | STATUS:  *In progress* |

**Family Case Plan Topics**  ‹

**Update Information**  UI
✔ Completed

**Parties to the Plan**  PP
❗ *Not Completed*

**Strengths And Needs**  SN
❗ *Not Completed*

**Child(ren) Participating in the Family Case Plan**

Sacwis, Susie / 123456  - Female Age 8, DOB 10/05/2015
Protected under ICWA: ℹ ⓐ                          Child Location:
No                                                 Certified Foster Home

Agency Legal Status:              Court Case Number:        Court ID Number:
Permanent Custody                                           ℹ
                                  12345678

The system does not copy **Child Location**, **Visitation**, or **Caregiver Services** information when a change in the Child Location setting was recorded for a child in the **Case Plan** since its approval.

**Family Case Plan Topics**  ‹

**Update Information**  UI
✔ Completed

**Parties to the Plan**  PP
❗ *Not Completed*

**Strengths And Needs**  SN
❗ *Not Completed*

**Concerns**  C
✔ Completed

**Child Location Information**  CI
✔ Completed

**Visitation**  V
✔ Completed

**Foster Youth Rights Handbook**  FH
✔ Completed

**Permanency Information -**  PC

**Child(ren) Participating in the Family Case Plan**

Sacwis, Susie / 123456  - Female Age 8, DOB 10/05/2015
Protected under ICWA: ℹ ⓐ                          Child Location:
No                                                 Certified Foster Home

Agency Legal Status:              Court Case Number:        Court ID Number:
Permanent Custody                 12345678                   ℹ

Child's Permanency Goal:  ⓐ

Adoption

[ Previous Topic ] [ Next Topic ]   [ Apply ] [ **Save** ] [ Cancel ]

# Updating a Family Case Plan

1. Edit the child(ren)s **Permanency Goal** by selecting the correct goal from the dropdown box.

**Note: Child Location** is a read only field that reflects the child's current Child Location.

2. Edit the **Court Case ID** if necessary.
3. Click the **Save** button.

The **Case Plan Topics** screen appears.

4. Complete the remaining **Case Plan Topics** links.

**Important:** Please see the [Completing a Family Case Plan](#) KBA for additional guidance.

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## Submitting for Approval

Once all of the changes have been recorded in the **Case Plan Topics**, the **Case Plan Change** is ready for **Approval**.



1. Click the **Submit for Approval** button.

   - When there is missing information the user will receive a red message stating, "Please correct the following data validation errors:"

   - Below the message is a description of the missing information.

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## End-Dated Case Services

If there are **End-Dated Case Services** linked to any of the concerns, the user will receive a message that begins with **"Warning".** This message identifies the **Case Service Category/Type** and **Risk Contributor** to which the case service is linked.



The system will automatically unlink the **End-Dated Case Services** from the concern.

**Important: This warning message will only display once indicating the end dated case services that are being unlinked.**

Once the **End-Dated Case Service** is unlinked, if there not a **Case Service** linked to the concern, the user will receive a validation error **"Concern Record needs to have a service record linked".**
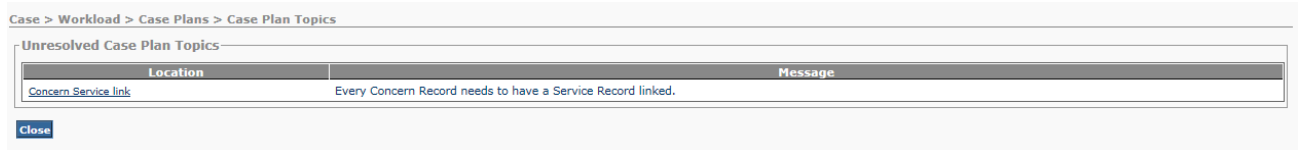


Once the validation errors have been corrected, the **Process for Approval** screen displays.



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# Updating a Family Case Plan

1. Make a selection from the **Action** dropdown menu.
2. Add any addional comments in the **Comments** box.
3. Verify the Agency defaulted to the correct **Agency**.
4. Make a selection for the **Reviewers/Approvers** dropdown menu.
5. Click the **Save** button.

If you have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).

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