

Recording a Safety Plan



Knowledge Base Article

Recording a Safety Plan

Table of Contents

Overview	3
Navigating to the Safety Plans List Screen.....	3
Creating a Safety Plan & Linking a Safety Assessment	4
Adding Participants to the Safety Plan	8
Completing the Action Steps Tab.....	11
Adding Safety Plan Activities	11
Entering the Monitoring Plan Details and Safety Response.....	16
Discontinuing a Safety Plan	24
Generating a Notice of Safety Plan Discontinuation	26
Working with Safety Plans Auto-Generated from Safety Assessment.....	27

Recording a Safety Plan

Overview

This article describes how to record a **Safety Plan** in Ohio SACWIS. A Safety Plan is automatically created by the system when a **Safety Assessment** is approved and the safety response for one or more children is **In-Home Safety Plan** or **Out-of-Home Safety Plan**.

Safety Plans can also be created manually. This article explains how to manually create a Safety Plan and how to enter details to the plan to complete it. The final section explains which items are pre-filled on a system-generated Safety Plan.

Navigating to the Safety Plans List Screen

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

Case Workload

Caseworker: Sort By: Case Name Ascending

Test, Worker (34 cases)

Test, Case Name [123456] - Open 03/05/2025 - Ongoing

The **Case Overview** screen appears.

4. Click the **Safety Plan** link in the **Navigation** menu.

Case Overview

Activity Log

Attorney Communication

Intake List

Safety Assessment

Substance Abuse Screening

Forms/Notices

Category/Pathway Switch

Safety Plan

CASE NAME / ID: **Ongoing**
Open (04/16/2025)

Test, Case Name / 123456

ADDRESS: 123 Test Rd
Test, OH 12345

CONTACT:

AGENCY: Test County Children Services Board

PRIMARY WORKER: SUPERVISOR(S):

Recording a Safety Plan

The **Safety Plans Filter Criteria** screen appears displaying the **Safety Plans** list section.

Safety Plans Filter Criteria

From Effective Date: To Effective Date:

Agency:

Plan Status:

Sort Results By:

Filter **Clear Form**

Safety Plans

Result(s) 0 / Page 0 of 0

Creating a Safety Plan & Linking a Safety Assessment

Complete the following steps to create a Safety Plan manually, and link a Safety Assessment to the plan.

1. In the **Safety Plans** section, click the **Add Safety Plan** button.

Safety Plans

Result(s) 0 / Page 0 of 0

Safety Plan ID	Plan Status	Effective Date	Discontinue Date	Reason for Safety Plan	Agency	Safety Plan Response
----------------	-------------	----------------	------------------	------------------------	--------	----------------------

Add Safety Plan

If any Safety Assessments are available to link to the Safety Plan, the **Available Safety Assessments** screen displays as shown on the next page. (If this screen does not appear, skip to **Step 3** below.)

Recording a Safety Plan

2. On the **Available Safety Assessments** screen:

- If you wish to link a Safety Assessment to the Safety Plan, click the **Select** link beside the appropriate **Safety Assessment ID**.
- OR if you do not wish to link a Safety Assessment, click the **Continue** button.

Case > Workload > Safety Plan > Participants

Case ID: 123456

Safety Plan ID:

Case Name: Test, Case Name

Plan Status:

In Progress

Available Safety Assessments				
	Safety Assessment ID	Date Approved	Safety Response	Agency Created
select	121212	05/16/2025	Legally Authorized Out of Home	County Children Services Board

[Continue](#) [Cancel](#)

Note: You can also click the **Cancel** button to return to the **Safety Plans** list section without saving a Safety Plan record.

3. The **Participants** tab appears displaying the **Linked Safety Assessment Information** grid.

- If the grid displays a linked Safety Assessment, skip to **Step 6** below.
- If no Safety Assessment has been linked, the **Link Safety Assessment** button appears as shown below.

Case > Workload > Safety Plan

Participants		Action Steps		
Case ID:		Safety Plan ID:	29749727	
Case Name:	Applesauce, Cinnamon	Plan Status:	In Progress	
Maintain Safety Plan Participants				
Linked Safety Assessment Information				
	Safety Assessment ID	Date Approved	Safety Response	Agency
Link Safety Assessment				
Safety Plan Created as a Result of:	<input type="text"/>	Work Item ID:	<input type="text"/>	
Child(ren) Participant Information				
	Child Name	DOB	Age	
Add Child Participant				

4. If you wish to link a Safety Assessment, click the **Link Safety Assessment** button.

Recording a Safety Plan

The **Available Safety Assessments** screen appears.

Case > Workload > Safety Plan > Participants

Case ID: 123456

Safety Plan ID:

Case Name: Test, Case Name

Plan Status:

In Progress

Available Safety Assessments				
	Safety Assessment ID	Date Approved	Safety Response	Agency Created
select	121212	05/16/2025	Legally Authorized Out of Home	County Children Services Board

5. Click the **Select** link beside the appropriate **Safety Assessment ID**.

6. The **Participants** tab appears displaying the linked Safety Assessment.

Case > Workload > Safety Plan

Participants		Action Steps		
Case ID:		Safety Plan ID:	29749729	
Case Name:	Applesauce, Cinnamon	Plan Status:	In Progress	
Maintain Safety Plan Participants				
Linked Safety Assessment Information				
	Safety Assessment ID	Date Approved	Safety Response	Agency
unlink	123456	04/08/2016	Safe	Ohio County Department of Job and Family Services
Safety Plan Created as a Result of:		<input type="text"/>	Work Item ID:	<input type="text"/>

7. If you wish to unlink a Safety Assessment, click the **Unlink** hyperlink beside the appropriate Safety Assessment.

8. If you wish to view a Safety Assessment, click the **Safety Assessment ID** hyperlink (shown in blue above).

Recording a Safety Plan

- In the **Safety Plan Created as a Result of** field, select the appropriate value from the drop-down list. (Optional)
 - This field allows you to specify the CAPMIS tool in which the assessment of safety was documented, or indicate a Safety Plan Modification.

Maintain Safety Plan Participants

Linked Safety Assessment Information

Safety Assessment ID	Date Approved	Safety Response	Agency
unlink 123456	04/08/2016	Safe	Ohio County Department of Job and Family Services

Safety Plan Created as a Result of:

- Family Assessment
- Case Review
- Semiannual Administrative Review
- Safety Assessment
- Screened in Report
- Safety Re-Assessment
- Safety Plan Modification
- Reunification Assessment
- Ongoing Case A/I

Work Item ID:

Child(ren) Participant Information

Child Na	DOB
----------	-----

[Add Child Participant](#)

- If you selected a value other than **Safety Assessment** or **Safety Plan Modification** in the previous step, then the **Work Item ID** field displays a list of corresponding work items available on the case. Select the appropriate **Work Item ID**. (Optional)
 - For example, if you selected **Safety Re-Assessment** in the previous step, the **Work Item ID** field will display the Safety Re-Assessments in the case so you can select the one that applies.

Continue to the next section to add **Participants** to the Safety Plan.

Recording a Safety Plan

Adding Participants to the Safety Plan

Complete the following steps to add the **Child Participants** and **Adult Participants** to the Safety Plan.

1. On the **Participants** tab, click the **Add Child Participant** button.

The screenshot shows the 'Participants' tab of a safety plan interface. At the top, there are two tabs: 'Participants' (highlighted in green) and 'Action Steps'. Below the tabs, the case information is displayed: Case ID, Case Name (Applesauce, Cinnamon), Safety Plan ID, and Plan Status (In Progress). The main section is titled 'Maintain Safety Plan Participants' and contains a 'Linked Safety Assessment Information' section with a table for Safety Assessment ID, Date Approved, and Safety Response. Below this is a 'Link Safety Assessment' button and fields for 'Safety Plan Created as a Result of:' and 'Work Item ID:'. The 'Child(ren) Participant Information' section has a table with columns for Child Name, DOB, and Age. The 'Add Child Participant' button is highlighted with a red box.

The **Available Safety Plan Participants** screen appears displaying the available case members.

2. Click the check box beside the **Name** of each child to be included in the Safety Plan.

The screenshot shows the 'Available Safety Plan Participants' screen. At the top, there are two tabs: 'Participants' and 'Available Safety Plan Participants'. Below the tabs, the case information is displayed: Case ID, Case Name (Applesauce, Cinnamon), Safety Plan ID, and Plan Status (In Progress). The main section is titled 'Available Safety Plan Participants' and contains a table with columns for Name, DOB, Age, and Gender. The first row is 'Applesauce, Baby' with a checked checkbox, DOB 02/02/2016, Age 0, and Gender Female. The 'Save' button is highlighted with a red box.

3. Click the **Save** button.

Recording a Safety Plan

The **Participants** tab displays the selected child(ren) in the **Child(ren) Participant Information** section.

Your data has been saved. [close confirmation](#)

Case > Workload > Safety Plan

Participants		Action Steps	
Case ID:		Safety Plan ID:	29749729
Case Name:	Applesauce, Cinnamon	Plan Status:	In Progress

Maintain Safety Plan Participants

Linked Safety Assessment Information

	Safety Assessment ID	Date Approved	Safety Response	Agency
unlink	13569290	04/08/2016	Safe	Ohio County Department of Job and Family Services

Safety Plan Created as a Result of: Work Item ID:

Child(ren) Participant Information

Child Name	DOB	Age	
Applesauce, Baby	02/02/2016	0	delete

Parent/ Guardian/ Custodian(s) Participant Information

Adult Name	DOB	Age	
Applesauce, Cinnamon	03/03/1993	23	delete

4. Click the **Add Adult Participant** button to select Parent/Guardian/Custodian(s) for the Safety Plan.

Note: The **Parent/ Guardian/ Custodian(s) Participant Information** section should include only Parent/Guardian/Custodian(s), not persons who will serve as Responsible Parties for any Safety Plan Action Step(s).

Recording a Safety Plan

The **Available Safety Plan Participants** screen appears displaying available case members.

5. Click the check box beside the **Name** of each Adult to include in the Safety Plan.
6. Click the **Save** button.

Case > Workload > Safety Plan > Participants

Case ID: Safety Plan ID: 29749730
Case Name: Applesauce, Cinnamon Plan Status: In Progress

Available Safety Plan Participants

	Name	DOB	Age	Gender
<input checked="" type="checkbox"/>	Applesauce, Cinnamon	03/03/1993	23	Female

The **Participants** tab displays the selected adult(s) in the **Parent/ Guardian/ Custodian(s) Participant Information** section.

Participants Action Steps

Case ID: Safety Plan ID: 29749730
Case Name: Applesauce, Cinnamon Plan Status: In Progress

Maintain Safety Plan Participants

Linked Safety Assessment Information

	Safety Assessment ID	Date Approved	Safety Response	Agency
unlink	10549290	04/08/2016	Safe	Ohio County Department of Job and Family Services

Safety Plan Created as a Result of: Work Item ID:

Child(ren) Participant Information

Child Name	DOB	Age	
Applesauce, Baby	02/02/2016	0	delete

Parent/ Guardian/ Custodian(s) Participant Information

Adult Name	DOB	Age	
Applesauce, Cinnamon	03/03/1993	23	delete

7. To remove a participant that was added in error, click the **Delete** link to the right of the appropriate participant.

Continue to the next section to complete the **Action Steps** tab.

Recording a Safety Plan

Completing the Action Steps Tab

Adding Safety Plan Activities

1. On the **Participants** screen, click the **Action Steps** tab.

The **Action Steps** tab appears.

2. Enter the **Safety Threats and Serious Harm** narrative.

Case > Workload > Safety Plan

Participants		Action Steps	
Case ID:		Safety Plan ID:	29749730
Case Name:	Applesauce, Cinnamon	Plan Status:	In Progress

Safety Threats and Serious Harm

Identify the safety threat(s) and serious harm from which the child(ren) needs protection: [\[expand full screen\]](#)

This is the safety threat and serious harm from which the child needs protection...

Spell Check Clear 3917

Safety Plan Activities		
Activity	Description	Responsible Parties
Add Activity		

Monitoring Plan Details

Explain how each activity will control the occurrence of serious harm: [\[expand full screen\]](#)

3. In the **Safety Plan Activities** section, click the **Add Activity** button.

Recording a Safety Plan

The **Safety Plan Activity Details** screen appears. The **Identified Safety Threats and Serious Harm** narrative is displayed at the top of the screen for reference (shown in green below).

- Record the narrative describing the activity in the **Describe the specific activities necessary to protect the child(ren)** field.

Case > Workload > Safety Plan > Action Steps > Safety Plan Action Step Details

Safety Plan Activity Details

Identified Safety Threats and Serious Harm
This is the safety threat and serious harm from which the child needs protection...

Describe the specific activities necessary to protect the child(ren): (expand full screen)
This is the first activity that will be implemented to protect the child...

Spell Check Clear 2925

Responsible Parties

Person ID	Name	Phone	Additional Information
-----------	------	-------	------------------------

Add Responsible Party

Apply Save Cancel

- Click the **Add Responsible Party** button to add a responsible party for this activity.

Responsible Parties

Person ID	Name	Phone	Additional Information
-----------	------	-------	------------------------

Add Responsible Party

Apply Save Cancel

Recording a Safety Plan

The **Responsible Party Details** screen appears. The **Name** field displays the list of **Active Case Members** and **Active Associated Persons** from the Case who may be selected as Responsible Parties.

Note: Safety Plan Participants from the current safety plan do not display, as the Child(ren) and Parent/Guardian/Custodian(s) cannot also be Responsible Parties.

The screenshot shows the 'Responsible Party Details' form. At the top, there is a breadcrumb trail: 'Case > Workload > Safety Plan > Action Steps > Safety Plan Action Step Details > Safety Plan Activity Details'. Below this, there are fields for 'Case ID:', 'Case Name: Applesauce, Cinnamon', 'Safety Plan ID: 29749730', and 'Plan Status: In Progress'. The main section is titled 'Responsible Party Details' and contains an 'Activity:' label. Below this, there are three input fields: 'Name:' (with a dropdown arrow), 'Phone:', and 'Extension:'. To the right of the 'Name' field is an 'OR' label, and to the right of the 'Phone' field is a 'Person Search' button. Below these fields is an 'Additional Information:' section with a text area and 'Spell Check', 'Clear', and '200' buttons. At the bottom of the form are 'Apply', 'Save', and 'Cancel' buttons.

6. In the **Name** field, select the Responsible Party (if already listed).
 - Then skip to **Step 10** below.
7. OR if the Responsible Party is not a current case member or associated person on the case, click the **Person Search** button (shown in blue above).
8. On the **Person Search** screen, search and select or create a Person to be the Responsible Party.

The **Responsible Party Details** screen appears with the name of the selected/created Person added to the **Name** drop-down list for selection.

Note: Responsible Parties who are not already Case Members or Associated Persons are automatically added to the Case Associated Persons.

9. In the **Name** field, ensure the appropriate Responsible Party is selected.
10. If the selected Person has a primary phone contact on his/her Person record, it will pull into the **Phone Number** field. If the field is blank, enter the person's 10-digit phone number. (Required)

Recording a Safety Plan

11. Enter the person's **Extension**, if applicable. (Optional)

12. In the **Additional Information** field, enter additional information regarding the Responsible Party, if applicable. (Optional)

Case ID: [redacted] Safety Plan ID: 29749730
Case Name: Applesauce, Cinnamon Plan Status: In Progress

Responsible Party Details

Activity: [redacted] OR [Person Search](#)

Name: Applesauce, Grammy / 15316790

Phone: (987) 654-3210

Extension: [redacted]

Additional Information: [redacted]

[Spell Check](#) [Clear](#) 200

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

13. Click the **Save** button to save the Responsible Party record.

The **Safety Plan Activity Details** screen appears displaying the Responsible Party record.

Safety Plan Activity Details

Identified Safety Threats and Serious Harm

This is the safety threat and serious harm from which the child needs protection...

Describe the specific activities necessary to protect the child(ren): [\(expand full screen\)](#)

This is the first activity that will be implemented to protect the child...

[Spell Check](#) [Clear](#) 3000

Responsible Parties

Person ID	Name	Phone	Additional Information
edit	Applesauce, Grammy	(987) 654-3210	delete

[Add Responsible Party](#)

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

Recording a Safety Plan

14. If appropriate, repeat **Steps 5-13** above to add additional Responsible Parties for this Activity.
15. When all Responsible Parties have been recorded for this Activity, click the **Save** button on the **Safety Plan Activity Details** screen.

The **Action Steps** tab appears. The **Safety Plan Activities** section now displays the Activity, the first 50 characters of the activity Description, and the Responsible Parties for that Activity.

Case > Workload > Safety Plan

Participants		Action Steps	
Case ID:		Safety Plan ID:	29749730
Case Name:	Applesauce, Cinnamon	Plan Status:	In Progress

Safety Threats and Serious Harm
Identify the safety threat(s) and serious harm from which the child(ren) needs protection: [expand full screen](#)

This is the safety threat and serious harm from which the child needs protection...

Spell Check Clear 4000

Safety Plan Activities

Activity	Description	Responsible Parties	
edit 1	This is the first activity that will be implemente	Applesauce, Grammy (15316790)	delete

[Add Activity](#)

16. To edit or delete an activity, click the **Edit** link or the **Delete** link beside the appropriate activity as shown below.

17. To add additional activities to the Safety Plan, click the **Add Activity** button and repeat the steps in this sub-section.

Safety Plan Activities

Activity	Description	Responsible Parties	
edit	This is the first activity that will be implemente	Applesauce, Grammy (1)	delete

[Add Activity](#)

Continue to the next section to complete the Monitoring Plan Details.

Recording a Safety Plan

Entering the Monitoring Plan Details and Safety Response

1. In the **Monitoring Plan Details** section of the **Action Steps** tab, record the appropriate narrative in the text fields:
 - Explain how each activity will control the occurrence of serious harm
 - How will the activity(ies) be monitored?
 - How often will the activity(ies) be monitored?
 - Who will monitor the activity(ies)?

Monitoring Plan Details

Explain how each activity will control the occurrence of serious harm: [\(expand full screen\)](#)

This is how each activity will control the occurrence of serious harm....

Spell Check Clear 3000

How will the activity(ies) be monitored? [\(expand full screen\)](#)

This is how the activities will be monitored...

Spell Check Clear 3000

How often will the activity(ies) be monitored? [\(expand full screen\)](#)

This is how often the activities will be monitored...

Spell Check Clear 1000

Who will monitor the activity(ies)? [\(expand full screen\)](#)

This is who will monitor....

Spell Check Clear 1000

Safety Response:

Safety Plan ready for Authorization:

Note: When "Yes" is selected, Participants and Action Steps will be frozen and Authorizations will become available.

2. In the **Safety Response** field, select the appropriate value from the drop-down list to indicate whether this is an In-Home or Out-of-Home Safety Plan.

Safety Response:

Safety Plan ready for Authorization:

In Home Safety Plan

Out-of-Home Safety Plan

Note: When "Yes" is selected, Participants and Action Steps will be frozen and Authorizations will become available.

Recording a Safety Plan

- When all Participants, Activities, Responsible Parties, Monitoring Plan Details, and the Safety Response have been recorded, you may indicate that the Safety Plan is ready for authorization. In the **Safety Plan ready for Authorization** field, select **Yes** from the drop-down list.

Safety Response:

Safety Plan ready for Authorization:

Note: When "Yes" is selected, Participants and Action Steps will be frozen and Authorizations will become available.

If any required fields have not been completed, the system will display a list of Validation Messages:

Case > Safety Plan > Validation

Safety Plan Validation Message(s)

Location	Message
Monitoring Plan	Monitoring Plan is required for Activity ID (27899016)

- Click the link in the **Location** column of a Validation Message to return to the appropriate screen to record the missing information, OR click the **OK** button to return to the **Action Steps** tab and record any missing information.

If there are no validation errors, a green message displays at the top of the screen:

• There are no Validation errors.

Case > Workload > Safety Plan

Participants		Action Steps	
Case ID:	Applesauce, Cinnamon	Safety Plan ID:	29749730
Case Name:		Plan Status:	In Progress

Safety Threats and Serious Harm

Identify the safety threat(s) and serious harm from which the child(ren) needs protection: [expand full screen](#)

This is the safety threat and serious harm from which the child needs protection...

Safety Plan Activities

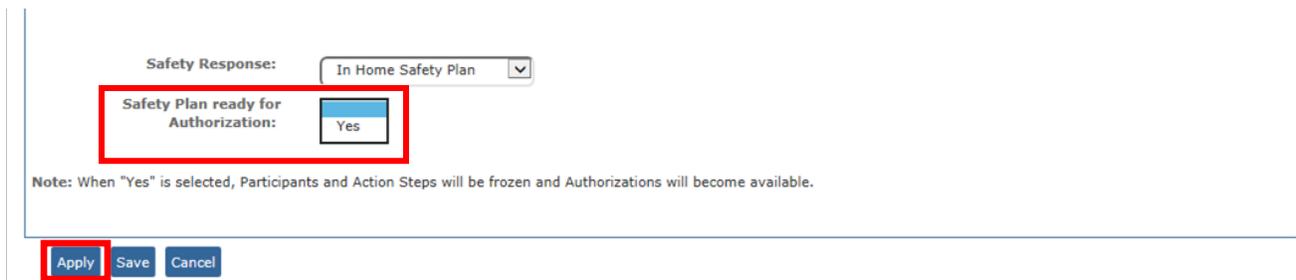
Activity	Description	Responsible Parties	
edit 1	This is the first activity that will be implemente	Applesauce, Grammy (15316790)	delete
edit 2	This is the second activity being implemented to p	Applesauce, Gramps (: 1) ; Applesauce, Grammy (15316790)	delete

Recording a Safety Plan

Note: When the Safety Plan is marked ready for Authorization and you click the **Apply** button or the **Save** button on the **Action Steps** tab, all information on the **Participants** and **Action Steps** tabs will be frozen and cannot be edited. The **Authorizations** tab will become available.

As long as no information has been recorded on the **Authorizations** tab, you can continue to edit the plan (by following the instructions in the next step below). Once any information has been documented on the **Authorizations** tab, however, no changes can be made to the content of the **Participants** or **Action Steps** tabs of the Safety Plan.

5. If you wish to continue editing the Safety Plan, remove the **Yes** response from the **Safety Plan ready for Authorization** field and click the **Apply** button. Then make the desired edits.
6. To change the Safety Plan status from **In Progress** to **Complete** and access the **Authorizations** tab: Select **Yes** in the **Safety Plan ready for Authorization** field and click the **Apply** button.



The screenshot shows a form with the following elements:

- Safety Response:** A dropdown menu with "In Home Safety Plan" selected.
- Safety Plan ready for Authorization:** A radio button labeled "Yes" is selected and highlighted with a red box.
- Note:** "When 'Yes' is selected, Participants and Action Steps will be frozen and Authorizations will become available."
- Buttons:** "Apply", "Save", and "Cancel" buttons are at the bottom. The "Apply" button is highlighted with a red box.

The **Authorizations** tab heading displays.



The screenshot shows the following interface elements:

- Message:** "Your data has been saved." with a "close confirmation" link.
- Breadcrumbs:** "Case > Workload > Safety Plan"
- Tabs:** "Participants", "Action Steps", and "Authorizations". The "Authorizations" tab is highlighted with a red box.
- Case Information:**
 - Case ID: Safety Plan ID: 29749730
 - Case Name: Applesauce, Cinnamon Plan Status: Complete
- Safety Threats and Serious Harm:** A section with a blue header and a text area containing the instruction: "Identify the safety threat(s) and serious harm from which the child(ren) needs protection: (expand full screen)"

7. Click the **Authorizations** tab to record the verbal authorization and/or signature details.

Recording a Safety Plan

The **Authorizations** tab appears.

Case > Workload > Safety Plan

Participants	Action Steps	Authorizations
Case ID:	Safety Plan ID:	29749730
Case Name: Applesauce, Cinnamon	Plan Status:	Complete

Maintain Safety Plan Authorizations

Has the parent/guardian/custodian(s) read or been read "Important Information about Safety Plans"?

Has any parent/guardian/custodian(s) or responsible party provided verbal approval of the Safety Plan (due to being unavailable to sign)?

Signatures

Indicate whether or not the signatures from the parent/guardian/custodian(s) and/or responsible parties have been obtained:

Participant or Responsible Party	Signature Received	Date Provided	Time Provided
Applesauce, Cinnamon / 1 (Parent/Guardian/Custodian)	<input type="text"/>	<input type="text"/>	<input type="text"/> AM
Applesauce, Grammy / : (Responsible Party)	<input type="text"/>	<input type="text"/>	<input type="text"/> AM
Applesauce, Gramps / 1 (Responsible Party)	<input type="text"/>	<input type="text"/>	<input type="text"/> AM

Caseworker: Supervisor:

Note: Once each verbal approval or signature has been saved, it cannot be edited, but missing verbal approval or signature information may be added.

Note: When each verbal approval or signature has been saved, it cannot be edited. But any missing verbal approval or signature information may be added.

8. Select the applicable response from the drop-down list to answer the question **Has the parent/guardian/custodian(s) read or been read "Important Information about Safety Plans"?**

Case > Workload > Safety Plan

Participants	Action Steps	Authorizations
Case ID:	Safety Plan ID:	29749730
Case Name: Applesauce, Cinnamon	Plan Status:	Complete

Maintain Safety Plan Authorizations

Has the parent/guardian/custodian(s) read or been read "Important Information about Safety Plans"?

Has any parent/guardian/custodian(s) or responsible party provided verbal approval of the Safety Plan (due to being unavailable to sign)?

Signatures

Indicate whether or not the signatures from the parent/guardian/custodian(s) and/or responsible parties have been obtained:

Recording a Safety Plan

9. Select the applicable response from the drop-down list to answer the question **Has any parent/guardian/custodian(s) or responsible party provided verbal approval of the Safety Plan (due to being unavailable to sign)?**

Note: If all parties were initially available to sign, it is not necessary to also record verbal agreement, and you may select the value **N/A** for this question.

Case > Workload > Safety Plan

Participants	Action Steps	Authorizations
Case ID:	Safety Plan ID:	29749730
Case Name: Applesauce, Cinnamon	Plan Status:	Complete
Maintain Safety Plan Authorizations		
Has the parent/guardian/custodian(s) read or been read "Important Information about Safety Plans"?		Yes ▾
Has any parent/guardian/custodian(s) or responsible party provided verbal approval of the Safety Plan (due to being unavailable to sign)?		<div style="border: 1px solid blue; padding: 2px; display: inline-block;"> Yes Refused N/A </div>
Signatures		
Indicate whether or not the signatures from the parent/guardian/custodian(s) and/or responsible parties have been obtained:		

If **Yes** or **Refused** is selected for this question, the **Verbal Approval** section displays as shown on the next page.

Maintain Safety Plan Authorizations

Has the parent/guardian/custodian(s) read or been read "Important Information about Safety Plans"? Yes ▾

Has any parent/guardian/custodian(s) or responsible party provided verbal approval of the Safety Plan (due to being unavailable to sign)? Yes ▾

Verbal Approval

Indicate whether or not verbal approval from the parent/guardian/custodian(s) and/or responsible parties has been obtained:

Participant or Responsible Party	Verbal Approval Received	Date Provided	Time Provided
Applesauce, Cinnamon / : (Parent/Guardian/Custodian)	▾	<input type="text"/>	<input type="text"/> AM ▾
Applesauce, Grammy / : (Responsible Party)	▾	<input type="text"/>	<input type="text"/> AM ▾
Applesauce, Gramps / (Responsible Party)	▾	<input type="text"/>	<input type="text"/> AM ▾

Signatures

Indicate whether or not the signatures from the parent/guardian/custodian(s) and/or responsible parties have been obtained:

Participant or Responsible Party	Signature Received	Date Provided	Time Provided
Applesauce, Cinnamon / : (Parent/Guardian/Custodian)	▾	<input type="text"/>	<input type="text"/> AM ▾

Recording a Safety Plan

10. Select the appropriate value for each Participant or Responsible Party's **Verbal Approval** and/or **Signatures**.

Verbal Approval
Indicate whether or not verbal approval from the parent/guardian/custodian(s) and/or responsible parties has been obtained:

Participant or Responsible Party	Verbal Approval Received	Date Provided	Time Provided
Applesauce, Cinnamon / (Parent/Guardian/Custodian)	Yes <input type="button" value="v"/>	04/04/2016 <input type="button" value="calendar"/>	11:00 AM <input type="button" value="v"/>
Applesauce, Grammy / (Responsible Party)	Yes <input type="button" value="v"/> Refused <input type="button" value="v"/> N/A <input type="button" value="v"/>	<input type="text"/> <input type="button" value="calendar"/>	<input type="text"/> AM <input type="button" value="v"/>
Applesauce, Gramps / (Responsible Party)	<input type="button" value="v"/>	<input type="text"/> <input type="button" value="calendar"/>	<input type="text"/> AM <input type="button" value="v"/>

Signatures
Indicate whether or not the signatures from the parent/guardian/custodian(s) and/or responsible parties have been obtained:

Participant or Responsible Party	Signature Received	Date Provided	Time Provided
Applesauce, Cinnamon / (Parent/Guardian/Custodian)	<input type="button" value="v"/>	<input type="text"/> <input type="button" value="calendar"/>	<input type="text"/> AM <input type="button" value="v"/>
Applesauce, Grammy / (Responsible Party)	Yes <input type="button" value="v"/>	04/04/2016 <input type="button" value="calendar"/>	11:10 AM <input type="button" value="v"/>
Applesauce, Gramps / (Responsible Party)	<input type="button" value="v"/>	<input type="text"/> <input type="button" value="calendar"/>	<input type="text"/> AM <input type="button" value="v"/>

11. For each **Yes** or **Refused** response, record the **Date Provided** and the **Time Provided** (shown in blue above).

Note: If any Participant or Responsible Party is unwilling to sign the Safety Plan, the status of the plan will be **Refused**. In this event, the PCSA shall implement alternative safety interventions, per **OAC 5101:2-37-02 PCSA Requirements for Completing the Safety Plan**.

Recording a Safety Plan

Note: If the signature of a parent, guardian, or custodian is waived, per **OAC 5101:2-36-11 Extending Time Frames for Completion or Waiving Completion of Assessment/ Investigation Activities**, a Justification/Waiver with a type of **Waive Safety Plan Signature** and the applicable Participant linked, must be **Approved** in Ohio SACWIS. Per rule, the waiver must document the reason(s) why the parent, guardian, or custodian who has not signed is unable or unavailable to sign the **JFS 01409 Safety Plan**.

Case > Workload > Justification/Waiver

Case ID: : Case Status: Open (04/01/2016)
 Case Name: Applesauce, Cinnamon Case Category: Alternative Response Assessment

Justification Request Details

Requested Date: 04/08/2016 Requestor Name: Worker, Case E.
 Decision Date: 04/08/2016 Approver: Worker, Case E.
 Status: Approved

Intake Information

Intake ID	Date Received	Intake Category	Intake Type
	04/01/2016	CA/N Report	Physical Abuse

Justification Type(s)

Justification Type	Intake Participants
Waive Safety Plan Signature	Applesauce, Cinnamon

Reason for Justification: [expand full screen](#)

This is the justification, as required per OAC 5101:2-36-11...

[Close](#)

If a Justification/Waiver meeting the above criteria has been approved in the case, then the value **Waived** will display in the **Signature Received** drop-down list for that Parent/Guardian/Custodian.

Signatures

Indicate whether or not the signatures from the parent/guardian/custodian(s) and/or responsible parties have been obtained:

Participant or Responsible Party	Signature Received	Date Provided	Time Provided
Applesauce, Cinnamon / (Parent/Guardian/Custodian)	Yes Refused Waived		
Applesauce, Grammy / 1 (Responsible Party)		04/04/2016	11:10 AM
Applesauce, Gramps / (Responsible Party)			

Caseworker: Supervisor:

12. Select the **Caseworker** who signed the Safety Plan. A Caseworker signature is required for the Safety Plan to be Effective.

13. Select the **Supervisor** (if any) who signed the Safety Plan.

Recording a Safety Plan

When a **Verbal Approval** or **Signature** has been obtained from each Participant and Responsible Party, and a **Caseworker** has been selected, the **Plan Status** will be updated to **Effective**.

When all signature information has been recorded, the Safety Plan may be routed for approval.

- If you wish to route the Safety Plan for approval, click the **Validate Approval** button. (Optional)

Has any parent/guardian/custodian(s) or responsible party provided verbal approval of the Safety Plan (due to being unavailable to sign)? Yes

Verbal Approval

Indicate whether or not verbal approval from the parent/guardian/custodian(s) and/or responsible parties has been obtained:

Participant or Responsible Party	Verbal Approval Received	Date Provided	Time Provided
Applesauce, Cinnamon / (Parent/Guardian/Custodian)	Yes <input type="checkbox"/>	04/04/2016 <input type="text"/>	11:00 AM <input type="text"/>
Applesauce, Grammy / : (Responsible Party)	N/A <input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Applesauce, Gramps / : (Responsible Party)	N/A <input type="checkbox"/>	<input type="text"/>	<input type="text"/>

Signatures

Indicate whether or not the signatures from the parent/guardian/custodian(s) and/or responsible parties have been obtained:

Participant or Responsible Party	Signature Received	Date Provided	Time Provided
Applesauce, Cinnamon / : (Parent/Guardian/Custodian)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Applesauce, Grammy / : (Responsible Party)	Yes <input type="checkbox"/>	04/04/2016 <input type="text"/>	11:10 AM <input type="text"/>
Applesauce, Gramps / : (Responsible Party)	<input type="text"/>	<input type="text"/>	<input type="text"/>

Caseworker: Supervisor:

Note: Once each verbal approval or signature has been saved, it cannot be edited, but missing verbal approval or signature information may be added.

Validate Approval Process Approval

- If any required information is missing on the **Authorizations** tab, a list of Validation Messages displays:

Case > Safety Plan > Validation

Safety Plan Validation Message(s)

Location	Message
Authorizations Tab	Signature information for Applesauce, Cinnamon / : is required
Authorizations Tab	Signature information for Applesauce, Gramps / 1 is required

OK

- Click the link in the **Location** column of a Validation Message to return to the appropriate screen to record the missing information, OR click the **OK** button to return to the **Authorizations** tab and record any missing information.

Recording a Safety Plan

When a Safety Plan has been **Approved** by a Supervisor, the **Plan Status** is updated to **Effective-Finalized**.

Safety Plans Filter Criteria

From Effective Date: To Effective Date:

Agency:

Plan Status:

Sort Results By:

[Filter](#) [Clear Form](#)

Safety Plans

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

	Safety Plan ID	Plan Status	Effective Date	Discontinue Date	Reason for Safety Plan	Agency	Safety Plan Response	
copy view reports	29749730	Effective-Finalized	04/04/2016		Safety Re-Assessment	Ohio County Department of Job and Family Services	In Home Safety Plan	discontinue

[Add Safety Plan](#)

Discontinuing a Safety Plan

Complete the following steps if you wish to discontinue a Safety Plan.

1. Navigate to the **Safety Plans Filter Criteria** screen displaying the **Safety Plans** section using the steps previously discussed.
2. Click the **Discontinue** link to the right of the appropriate plan.

Safety Plans Filter Criteria

From Effective Date: To Effective Date:

Agency:

Plan Status:

Sort Results By:

[Filter](#) [Clear Form](#)

Safety Plans

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

	Safety Plan ID	Plan Status	Effective Date	Discontinue Date	Reason for Safety Plan	Agency	Safety Plan Response	
copy view reports	29749730	Effective-Finalized	04/04/2016		Safety Re-Assessment	Ohio County Department of Job and Family Services	In Home Safety Plan	discontinue

[Add Safety Plan](#)

Recording a Safety Plan

The **Discontinue Work Details** screen appears.

Case ID: : Safety Plan ID: 29749730
Case Name: Applesauce, Cinnamon Plan Status: Effective-Finalized

Discontinue Work Details

Effective Date: 04/04/2016

End Date: *

Reason for Discontinuation: *

Additional Details Regarding Discontinuation of Work:

Spell Check Clear 1000

Have Appropriate Parties been Notified of Plan Discontinuation? No Date:

Save Cancel

3. Enter the **End Date** of the Safety Plan. (Required)
4. Select the **Reason for Discontinuation** from the drop-down list. (Required)
5. Enter any additional details in the **Additional Details Regarding Discontinuation of Work** text box. (Optional)
6. Select the appropriate response from the drop-down list to answer the question **Have Appropriate Parties been Notified of Plan Discontinuation?**
7. Enter the **Date** of the notification.

Discontinue Work Details

Effective Date: 04/04/2016

End Date: * 04/08/2016

Reason for Discontinuation: * Family Stabilized

Additional Details Regarding Discontinuation of Work:

Spell Check Clear 1000

Have Appropriate Parties been Notified of Plan Discontinuation? Yes No Date: 04/08/2016

Save Cancel

8. Click the **Save** button.

The **Safety Plans** list displays the Safety Plan with a **Plan Status** of **Discontinued** (shown in green on the next page).

Recording a Safety Plan

Generating a Notice of Safety Plan Discontinuation

If you wish to generate a termination letter after Discontinuing a Safety Plan, complete the following steps.

1. In the **Safety Plans** list, click the **Reports** link beside the **Discontinued** Safety Plan.

Safety Plans								
Result(s) 1 to 2 of 2							Page 1 of 1	
	Safety Plan ID	Plan Status	Effective Date	Discontinue Date	Reason for Safety Plan	Agency	Safety Plan Response	
edit	29753720	In Progress				Ohio County Department of Job and Family Services		delete
reports								
copy	29749730	Discontinued	04/04/2016	04/08/2016	Safety Re-Assessment	Ohio County Department of Job and Family Services	In Home Safety Plan	
view								
reports								

[Add Safety Plan](#)

The **Reports** screen appears.

2. In the **Generate Document** drop-down list, select **Safety Plan Termination Letter**.
3. Click the **Select** button.

Reports

Work-Item Type: CASE Work-Item Reference:

Task Type: SP Task Reference:

Available Documents

Generate Document: [JFS 01409 - Safety Plan Safety Plan Termination Letter](#)

[Select](#) [Cancel](#)

When the letter is generated and saved, the system automatically creates an **Activity Log** in the Case stating that the letter was generated:

Activity Log							
Result(s) 1 to 3 of 3							Page 1 of 1
	Activity Date	Contact Type	Category	Sub Category	Created By	Activity State	Narrative
edit	04/08/2016 11:00 AM	Face-to-Face	Assessment/Investigation Mandate	Adult Subject of Report , Assessment/Investigation Initiated , Child Subject of Report	Case E. Worker	Completed	amend
copy							
report							
Associated Participants: Baby Applesauce , Cinnamon Applesauce							
edit	04/08/2016	Letter To	Correspondence	Safety Plan Discontinuation Letter	Case E. Worker	Completed	amend
copy							
report							
Associated Participants: Baby Applesauce , Cinnamon Applesauce							

Recording a Safety Plan

Working with Safety Plans Auto-Generated from Safety Assessment

When a Safety Assessment has a **Safety Response** of **In-Home Safety Plan** or **Out-of-Home Safety Plan** for one or more children, then upon Approval of the Safety Assessment, the system will create a Safety Plan with a **Status** of **In Progress**.

Case > Workload > Safety Assessment

Safety Assessment	Safety Factors	Safety Consideration	Safety Response
Case ID:		Safety Assessment ID:	19551290
Case Name:	Applesauce, Cinnamon	Status:	In Progress

Section 6: Safety Response

Safety Response Details

All Children in the Home are Safe

Select the appropriate safety response for each child:

Name	Safety Response
Applesauce, Baby	<ul style="list-style-type: none">In Home SPOut Home SPLegally Authorized Out-of-Home PlacementNot Included in SP

[Generate Safety Response](#)

In this event, the in-progress Safety Plan will have the **Safety Assessment** already **Linked**, and the Child and Adult **Participants** from the Safety Assessment will be populated in the Safety Plan.

The Caseworker can then update and add the remaining details to the Safety Plan in order to complete it.

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