

# **Adding Case Plan Signature Details**



**Knowledge Base Article**

# Adding Case Plan Signature Details

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# Adding Case Plan Signature Details

## Overview

This article describes the **Signature Details** screen available for Case Plans that have a status of **In Progress**, as well as case plans that have already been **Approved**.

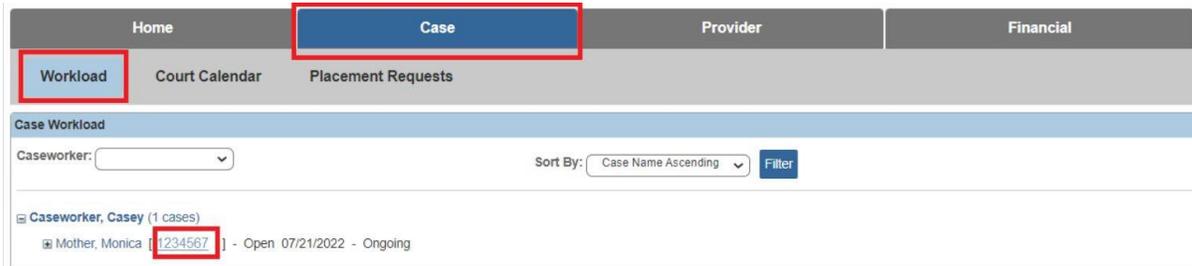
Once saved, a participant's signature detail information is "frozen" and cannot be changed. However, other new participant's signature detail information can still be added.

To add case plan signature detail information, complete the following steps:

## Navigating to the Screen

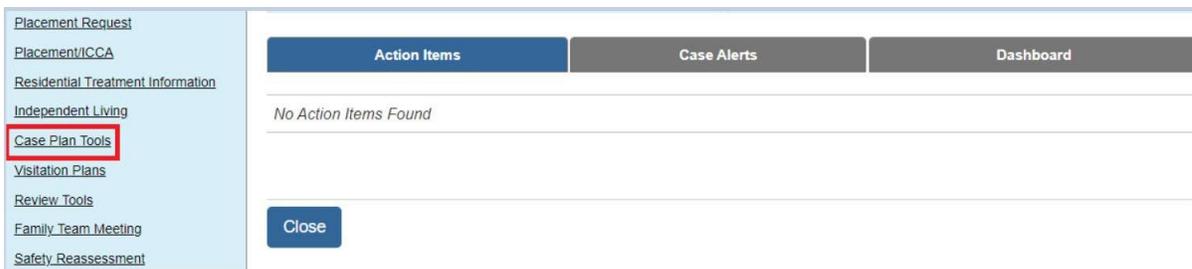
1. From the Ohio SACWIS **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Select the appropriate **Case ID** link.

**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.

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



The **Plan Filter Criteria** screen appears displaying the **Plans** section below it.

5. To view signature detail information, click the **View** link in the appropriate row.

# Adding Case Plan Signature Details

- To add case plan signature information, click the **Edit** link in the appropriate row.

Plan Filter Criteria

Agency:

[Filter](#)

Plans

[Add Family Case Plan](#)

Result(s) 1 to 2 of 2 / Page 1 of 1

	Plan Name	Plan Number	Plan Type	Effective Date	Agency	
<a href="#">edit</a>	Initial	2.00	Family Case Plan Status: In progress		Ohio Child Welfare Agency	
<a href="#">view</a> <a href="#">update</a>	Initial	1.00	Family Case Plan Status: <a href="#">Approved</a>	08/23/2022 - Adult Signature	Ohio Child Welfare Agency	

The **Family Case Plan Topics** screen appears.

- Click the **Court and Signatures** link.

Family Case Plan Topics <

- [Parties to the Plan](#) (PP) Completed
- [Strengths And Needs](#) (SN) Completed
- [Concerns](#) (C) Completed
- [Placement Information](#) (PI) Completed
- [Visitation](#) (V) Completed
- [Foster Youth Rights Handbook](#) (FH) Completed
- [Court and Signatures](#) (CS)
- [Approval](#) (A)

## Adding Case Plan Signature Details

The **Court and Signature** screen appears.

### Adding Court and Signatures Information

1. In the **Court Information** section, complete the fields as needed.
  - If signature details are being added to an **Approved** case plan, the **Court Status** field is required to save the record.

**Court Information**

Court File Date:   Court Status:  

Court Name:  

Judge / Magistrate:  

### Adding Plan Participant Signatures

1. Each Plan Participant should be displayed and a selection made for each question, for each participant:
  - **Family Case Plan Role**
  - **Signature Captured** (Note: The **Captured Date** box appears if answer is 'Yes', **Reason Signature Not Captured** drop-down appears if answer is 'No'.)
  - **Jointly Developed Plan**
  - **Agreed with Plan**
  - **Participation**
  - **Date Copy of Plan Provided**
2. Select from **Remaining Participants**, if applicable.

#### Important:

- The **Captured Date** field and **Reason** field are only modifiable depending on the answer selected in the **Signature Captured** field.
  - If **Yes** is selected, the **Reason** field becomes unavailable (disabled) and the **Captured Date** calendar appears. A date must be selected.
  - If **No** is selected, the **Captured Date** calendar disappears and the **Reason** field becomes available. A reason must be selected.
- Whether **Yes** or **No** is selected, the remaining fields in the row must be completed.

### Adding Associated Plan Participants Signatures

1. Choose the **Family Case Plan Role**: for each individual listed
2. Enter **Yes** or **No** to indicate if **Signature Captured**:

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3. Select method of **Participation**: (select N/A as applicable)
4. Enter Date Copy of Plan Provided: using the text box or calendar icon.
5. Click the trash can icon (  ) to delete any Associated Plan Participants you wish to remove from the list.
6. Click **Add Additional Signature** to select another person to add to the case plan signature list.

**Associated Plan Participants**

Attorney, Ava 

Family Case Plan Role: GAL

Signature Captured: Yes

Captured Date: 12/05/2022 

Participation: Video Conference

Date Copy of Plan Provided: 12/05/2022 

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Caseworker, Casey 

Family Case Plan Role: Case Worker

Signature Captured: Yes

Captured Date: 12/05/2022 

Participation: In Person

**Add Additional Signature**

The Additional Signatures page appears.

7. Check the box next to an individual listed under the **Additional Signatures** list of **Persons Connected to the Case**.
8. To add an individual not listed, click the **Search Person** button to complete a person search and select and/or add that person's information.

**Additional Signatures**

**Persons Connected to the Case**

<input type="checkbox"/>	Available Persons
<input type="checkbox"/>	Supervisor, Stephanie / - Assigned Worker
<input type="checkbox"/>	Worker, Wendy / - Assigned Worker
<input type="checkbox"/>	Uncle, Ulysses / - Associated Person
<input type="checkbox"/>	Friend, Frannie M. / - Associated Person
<input type="checkbox"/>	Friend, Phillipa / - Associated Person

**Additional Persons**

**Search Person**

The **Person Search Criteria** screen appears.

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9. Enter the filter criteria to search for the person.
10. Click the **Search** button.
11. If the person exists in Ohio SACWIS, click the **select** hyperlink next to their record.
12. If not, click the **Create New Person** button.

**Search For Person**

Person ID:  -- OR -- SSN:

*Note: If Person ID or SSN are entered, all other search criteria will be ignored*

Last Name:  First Name:  Middle Name:  Gender:

DOB:  -- OR -- Age Range:  -

From Age To Age

Reference, TCN, and Address Criteria

Name Match Precision  
Returns results matching entered names including AKA names/nicknames

Sort by:

Relevance (Highest-Lowest)

Power Results  More Results

**Person Search Results**

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

Include only active case members

	Person Name / ID	Address	Gender
<a href="#">select</a>	Director, Dana / 28678935		

[Related Persons](#)

13. Enter the person's information.
14. **Save** the record.
15. Then select the **Family Case Plan Role** for that person's record at the bottom of the Additional Signatures page.
16. Click **Save** on the footer to return to the Court and Signatures main page.

Selected Person: Director, Dana / 28678935

Family Case Plan Role:

17. Click Save at the bottom to return to the **Court and Signatures** main page.

# Adding Case Plan Signature Details

## Adding Director's Signature for QRTP Placements

The example shown in the screen shots above details how to add in the Title IV-E Agency Director's Signature in the instance where it is required for QRTP Placements (if not assigned to the case). When the Role of **Title IV-E Agency Director** is added to a signature, the field **Approval of continued QRTP placement for the following child(ren):** will appear, populated with a list of those youth placed in a congregate care facility. Place a check next each child's name for whom director's approval is being sought.

Director, Dana

Family Case Plan Role:  
Title IV-E Agency Director

Signature Captured:  
Yes

Captured Date:  
12/06/2022

Approval of continued QRTP placement for the following child(ren):  
 FosterChild, Philomena

Date Copy of Plan Provided:  
12/06/2022

If you need additional information or assistance, please contact the Bureau of Children Services Operational Support's [Customer Care Center](#).