

## Creating a Recommended Case Plan

New functionality in SACWIS allows you to create a case plan when changes are being recommended by the court; even when the recommendation has not yet been approved by the court. It allows you to identify a **Recommended Legal Status**, **Recommended Placement Type** and/or a **Recommended Visitation Plan**.

The **Recommended Case Plan** can be processed for approval by a supervisor, although the system will allow changes to be made until it is finalized. Once the court approves the **Recommended Case Plan** and it is finalized, the **Recommended Case Plan** is “locked down” in SACWIS and becomes the current case plan.

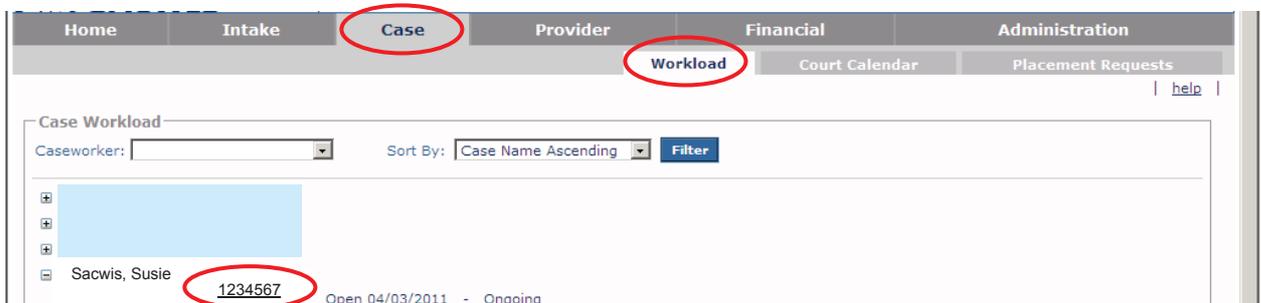
**Example:** An agency has Court Ordered Protective Supervision, but is requesting Temporary Custody. The court has requested that a case plan be presented to the court for the preferred disposition. A case plan can now be created to show the requested outcome without having to change the current legal status and placement information in SACWIS.

**IMPORTANT:** A Recommended Case Plan should not be used for permanent custody children as the information will not “pull through” to the adoption case in SACWIS. A proposed case plan should still be used for this purpose.

### Adding a New Recommended Case Plan

1. From the 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.

## Creating a Recommended Case Plan

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

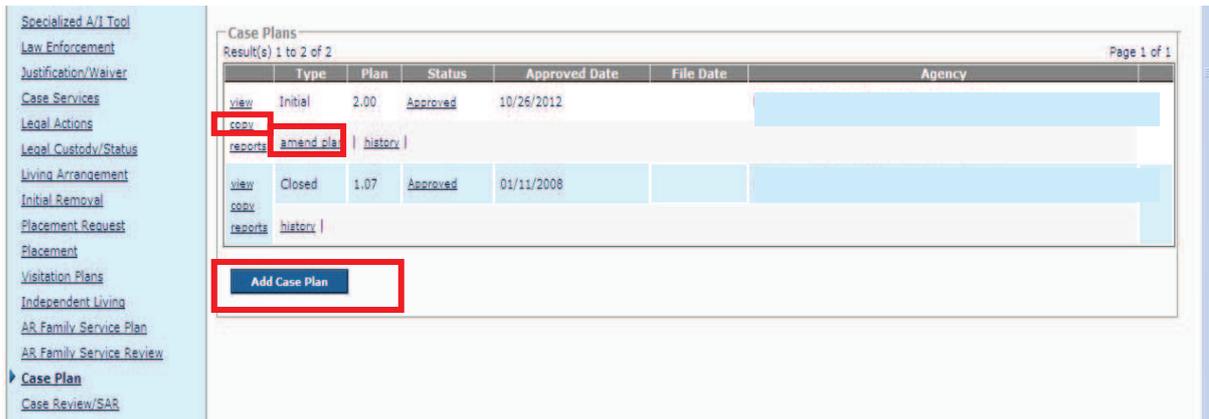


The **Case Plan Filter Criteria** screen appears displaying the **Case Plans** section below it.

5. To add a recommended case plan, click one of the following:

- **Add Case Plan** button
- **Copy** link, or
- **Amend Plan** link

**Important:** If the case plan is being amended to create a recommended case plan, the system will create a **Recommended Amendment** for the case plan. Otherwise, a new case plan series will be created for the case.



The **Identifying Information** screen appears.

## Creating a Recommended Case Plan

6. In the **Case Plan Type** field, select **Initial** from the drop-down list.

**Important:** If amending a case plan, the **Case Plan Type** field will display **Amended** with no drop-down list.

The screenshot shows the 'Identifying Information' section of a case plan form. The 'Case Plan Type' dropdown menu is open, showing 'Initial' and 'Proposed' options. The 'Recommended' checkbox is currently unchecked and disabled. The form includes fields for Plan Number (0.00) and Status (Approved). Below the identifying information is a table for 'Child(ren) Participating in the Case Plan' with columns for Person ID, Name, DOB, Type of Placement, Child's Permanency Goal, and Court Case/ID #. There are four rows of child information, each with an 'edit' link and a 'delete' link. An 'Add Child' button is located at the bottom left of the table.

As shown in gold above and below, once **Initial** is selected, the **Recommended** check box becomes enabled (available). However, if the case plan type of **Proposed** is selected, the **Recommended** check box remains disabled.

7. Click the **Recommended** check box.

The screenshot shows the same case plan form as above, but with the 'Case Plan Type' dropdown set to 'Initial'. The 'Recommended' checkbox is now checked and enabled. Below the child information table, a new section titled 'Recommended Case Plan Information' is visible, containing a table with columns for Person ID, Name, Current Legal Status, Recommended Agency Legal Status, and Recommended Placement Type. This section is highlighted with a red border.

The **Recommended Case Plan Information** section appears in the middle of the screen.

## Creating a Recommended Case Plan

- If no goal appears in the **Child's Permanency Goal** field, select one from the drop-down list (required).

Child(ren) Participating in the Case Plan

Person ID	Name	DOB	Type of Placement	Child's Permanency Goal 	Court Case/ID #
<a href="#">edit</a>				Maintain in own home; prevent removal	<a href="#">delete</a>
<a href="#">edit</a>					<a href="#">delete</a>
<a href="#">edit</a>					<a href="#">delete</a>
<a href="#">edit</a>					<a href="#">delete</a>

[Add Child](#)

**Important: To approve the Recommended Case Plan, one of the following things must occur:**

- Complete at least one of the two fields in the **Recommended Case Plan Information** section (**Recommended Agency Legal Status** field or **Recommended Placement Type** field)

**OR**

- Create a **Recommended Visitation Plan** (Refer to the **Placement Visitation Link** section for more details.)

- Click the **Save** button at the bottom of the screen.

Recommended Case Plan Information

Person ID	Name	Current Legal Status	Recommended Agency Legal Status	Recommended Placement Type
			Temporary Custody	Certified/Approved Relative - CAR

Adult(s) Participating in the Case Plan

Person ID	Name	Relationship to Child	DOB	Age
<a href="#">edit</a>		relationship		<a href="#">delete</a>
<a href="#">edit</a>		relationship		<a href="#">delete</a>

[Add Adult](#)

The **Case Plan Topics** screen appears.

## Creating a Recommended Case Plan

### Important:

- If recommended placement and legal status involve agency custody, the **Placement Topics** links will appear as shown.
- Based on the selections made in the two recommended fields on the **Identifying Information** screen, your screen might look different than the one shown here.

Case Plan Topics  
Case Plan Type: Initial Plan Number: 3.00 - R1 Status: In progress

Topic	Status
<a href="#">Identifying Information</a>	Provided
<a href="#">Strengths and Concerns</a>	24 Strength(s) / 24 Concern(s) Records Entered
<a href="#">Placement Information</a>	Not Provided
<a href="#">Placement Visitation</a>	1 Visitation Plan(s) Linked
<a href="#">Caregiver Services</a>	0 Service(s) Linked
<a href="#">Exceptions Information</a>	Not Provided
<a href="#">Independent Living Information</a>	Not Provided
<a href="#">Court/Signature Details</a>	0 Signature(s) Provided
<a href="#">Family Participation</a>	Not Provided

Validate for Approval Process for Approval

As a second example, if the **Recommended Agency Legal Status** field and the **Recommended Placement Type** field values are **Court Ordered Protective Supervision** (or left blank), the **Placement Topics** links will **not** appear:

Recommended Case Plan Information

Person ID	Name	Current Legal Status	Recommended Agency Legal Status	Recommended Placement Type
		Temporary Custody	Court Ordered Prot Sup	Own Home

After clicking the **Save** button, the **Case Plan Topics** screen will appear as follows:

Case Plan Topics  
Case Plan Type: Initial Plan Number: 2.00 - R1 Status: In progress

Topic	Status
<a href="#">Identifying Information</a>	Provided
<a href="#">Strengths and Concerns</a>	3 Strength(s) / 3 Concern(s) Records Entered
<a href="#">Exceptions Information</a>	Not Provided
<a href="#">Independent Living Information</a>	Not Provided
<a href="#">Court/Signature Details</a>	0 Signature(s) Provided
<a href="#">Family Participation</a>	Not Provided

Validate for Approval Process for Approval

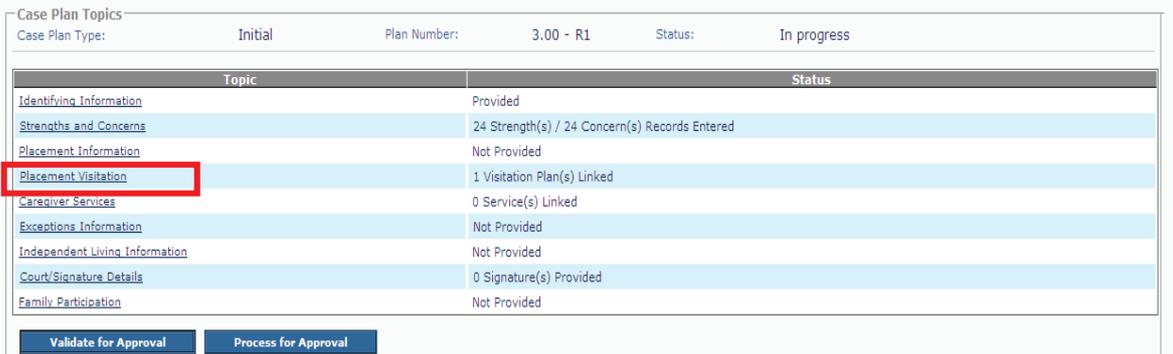
# Creating a Recommended Case Plan

## Completing Topics on a Recommended Case Plan

### Placement Visitation Link

To create a recommended visitation plan, complete the following steps:

1. Click the **Placement Visitation** link.

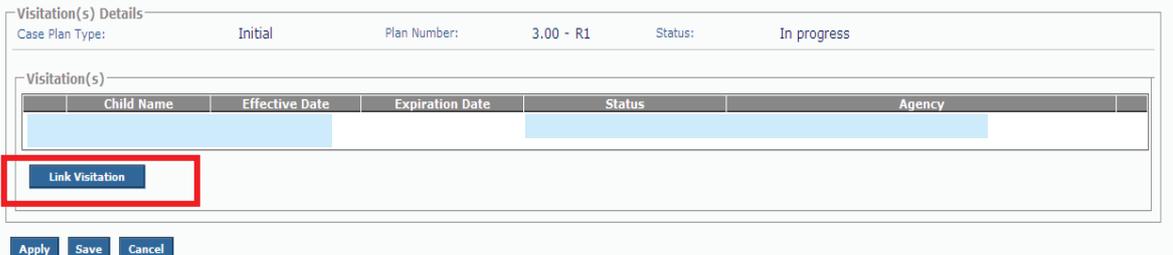


The screenshot shows the 'Case Plan Topics' interface. At the top, it displays 'Case Plan Type: Initial', 'Plan Number: 3.00 - R1', and 'Status: In progress'. Below this is a table with two columns: 'Topic' and 'Status'. The 'Placement Visitation' row is highlighted with a red box. At the bottom of the table are two buttons: 'Validate for Approval' and 'Process for Approval'.

Topic	Status
Identifying Information	Provided
Strengths and Concerns	24 Strength(s) / 24 Concern(s) Records Entered
Placement Information	Not Provided
Placement Visitation	1 Visitation Plan(s) Linked
Caregiver Services	0 Service(s) Linked
Exceptions Information	Not Provided
Independent Living Information	Not Provided
Court/Signature Details	0 Signature(s) Provided
Family Participation	Not Provided

The **Visitation(s) Details** screen appears.

2. Click the **Link Visitation** button.



The screenshot shows the 'Visitation(s) Details' interface. At the top, it displays 'Case Plan Type: Initial', 'Plan Number: 3.00 - R1', and 'Status: In progress'. Below this is a table with columns: 'Child Name', 'Effective Date', 'Expiration Date', 'Status', and 'Agency'. The table is currently empty. Below the table is a 'Link Visitation' button, which is highlighted with a red box. At the bottom are three buttons: 'Apply', 'Save', and 'Cancel'.

Child Name	Effective Date	Expiration Date	Status	Agency
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The **Visitation Plans Filter Criteria** screen appears.

## Creating a Recommended Case Plan

3. In the **Child Name** field, select the appropriate name from the drop-down list.
4. In the **Effective Date** field, select the appropriate date.
5. Click the **Add Visitation Information** button.

**Important:** If a visitation plan already exists and you click the **Add Visitation Information** button and then link a recommended visitation plan, the system will remove the existing visitation plan from the recommended case plan.

Visitation Plans Details

Agency: [ ]

Child Name: \* SACWS, Susie

Effective Date: \* 12/02/2011

Expiration Date: [ ]

Name	Frequency	Duration	Location	Restricted Visit	Supervised Visit	Effective Date	End Date
<b>Add Visitation Information</b>							

The **Visitation Information Details** screen appears.

6. Complete all of the mandatory fields as shown in this example.
7. Click the **OK** button.

Visitation Information Details

Effective Date: \* 12/02/2011

End Date: [ ]

Member Who May Visit: [ ]

Non-Case Member Who May Visit: [ ]

How Often: \* weekly

How Long (Duration): \* 5 hours

Where: \* Agency Setting

Other Location Information: [ ]

Restricted Visit:  Yes  No

Supervised Visit:  Yes  No

State the restriction on visitation and/or supervision. Explain the reasons for any restrictions on the location, frequency, and duration of visitation and/or the need for supervised visitation:

Spell Check Clear 4000

Other Approved Communication: \* N/A

Spell Check Clear 997

**OK** Cancel

## Creating a Recommended Case Plan

The **Visitation Plans Details** screen appears displaying the new information in the **Visitation Information** section as shown.

To accept the modified data, click Apply. close confirmation

Case ID: [redacted] Case Status: Open ( 05/01/2011 )  
Case Name: [redacted] Case Category: Ongoing

Visitation Plans Details  
Agency: [redacted] Department of Job and Family Services  
Child Name: \* [redacted]  
Effective Date: \* 12/02/2011 Expiration Date: [redacted]

	Name	Frequency	Duration	Location	Restricted Visit	Supervised Visit	Effective Date	End Date	
<a href="#">copy</a>	[redacted]	weekly	5 hours	Agency Setting	No	No	12/02/2011		<a href="#">delete</a>

[Add Visitation Information](#)

**Important:** In the **Status** field (bottom of the screen), the only status available is **Recommended**. A traditional visitation plan cannot be created from a recommended case plan and vice versa. Additionally, a recommended visitation plan cannot be created outside of the recommended case plan and is not an option to select in the **Navigation** menu on the **Case Overview** screen.

8. When complete, click the **Save** button.

Status: \* [Recommended] [Recommended]

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

The **Visitation Plans Filter Criteria** screen appears.

9. In the **Visitation Plans** section, click the check box in the appropriate row.
10. Click the **OK** button.

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

	Child Name	Effective Date	Expiration Date	Status:	Agency
<input checked="" type="checkbox"/>	[redacted]	12/02/2011		Recommended	[redacted] Department of Job and Family Services

[Add Visitation Plan](#)

[OK](#) [Cancel](#)

The **Visitation(s) Details** screen appears.

# Creating a Recommended Case Plan

11. If needed, click the **Unlink** hyperlink to unlink a **Recommended Visitation Plan**.

12. When complete, click the **Save** button.

To accept the modified data, click Apply. close confirmation

Case ID: [redacted] Case Status: Open  
Case Name: [redacted] Case Category: Ongoing

Visitation(s) Details  
Case Plan Type: Initial Plan Number: 3.00 - R1 Status: In progress

Child Name	Effective Date	Expiration Date	Status	Agency
[redacted]	[redacted]	[redacted]	Recommended	County Children Services Board

[Link Visitation](#)

[Unlink](#)

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

## Caregiver Services Link

If the recommended case plan is created with a **Recommended Placement Setting Type**, new caregiver services cannot be added until the new placement record is created.

The recommended case plan can be processed for approval without the caregiver services being linked. However, prior to finalization of the recommended case plan, caregiver services will need to be linked.

Case Plan Topics  
Case Plan Type: Initial Plan Number: 3.00 - R1 Status: In progress

Topic	Status
<a href="#">Identifying Information</a>	Provided
<a href="#">Strengths and Concerns</a>	24 Strength(s) / 24 Concern(s) Records Entered
<a href="#">Placement Information</a>	Not Provided
<a href="#">Placement Visitation</a>	1 Visitation Plan(s) Linked
<a href="#">Caregiver Services</a>	0 Service(s) Linked
<a href="#">Exceptions Information</a>	Not Provided
<a href="#">Independent Living Information</a>	Not Provided
<a href="#">Court/Signature Details</a>	0 Signature(s) Provided
<a href="#">Family Participation</a>	Not Provided

[Validate for Approval](#) [Process for Approval](#)

# Creating a Recommended Case Plan

## Processing for Approval

1. When the required fields within each **Topic** column link are completed, click the **Process for Approval** button.

Case Plan Topics  
Case Plan Type: Initial Plan Number: 3.00 - R1 Status: In progress

Topic	Status
<a href="#">Identifying Information</a>	Provided
<a href="#">Strengths and Concerns</a>	24 Strength(s) / 24 Concern(s) Records Entered
<a href="#">Placement Information</a>	Not Provided
<a href="#">Placement Visitation</a>	1 Visitation Plan(s) Linked
<a href="#">Caregiver Services</a>	0 Service(s) Linked
<a href="#">Exceptions Information</a>	Not Provided
<a href="#">Independent Living Information</a>	Not Provided
<a href="#">Court/Signature Details</a>	0 Signature(s) Provided
<a href="#">Family Participation</a>	Not Provided

[Validate for Approval](#) [Process for Approval](#)

If any validations show unresolved topics, links will appear in the **Unresolved Case Plan Topics** grid as shown below.

2. To correct unresolved topics, click each link in the **Location** column.

**Important:** To process a recommended case plan for approval, the required fields within each **Unresolved Case Plan Topic** link must be completed. However, only some of those links are discussed in this Knowledge Base Article.

Unresolved Case Plan Topics

Location	Message
<a href="#">Family Participation Link</a>	Family Participation text is required.
<a href="#">Exception</a>	All Exception narrative texts are required.
<a href="#">Independent Living</a>	Independent Living information is not provided.
<a href="#">Placement Information</a>	All Placement Information (Setting, Questions) identified in the Case Plan needs to be completed.
<a href="#">Strength Concern Blank</a>	At least one Strength or Concern record contains a blank description.

[Close](#)

3. Resolve the unfinished topics.
4. When complete, click the **Process for Approval** button again.

Once the unresolved links are resolved, the **Process Approval** screen appears.

## Creating a Recommended Case Plan

5. Route the recommended case plan for approval according to your agency's processes.
6. In the **Action** field, select **Approved – Final**.
7. Click the **Save** button.

Process Approval

Work Item

ID: [Redacted] Type: CASE Reference: [Redacted]  
Task ID: [Redacted] Task Type: Case Plan Task Reference: [Redacted]  
Task Status: [Redacted]

Action: \* Approved -Final

Comments:

Spell Check Clear 2000

Agency: County Department of Job and Family Services Reviewers/Approvers: Please Select A Reviewer

Save Cancel

8. When the **Close** button is clicked, the **Case Plans Topics** screen appears displaying an **R** (Recommended) next to the plan number (shown below).

**Important:** Once the **Recommended Case Plan** is approved, it can be edited until it has been finalized or a **Court Status** of **Declined** is added.

Case Plan Topics

Case Plan Type: Initial Plan Number: 3.00 - R1 Status: Approved

Topic	Status
Identifying Information	Provided
Strengths and Concerns	1 Strength(s) / 1 Concern(s) Records Entered
Placement Information	Provided
Placement Visitation	1 Visitation Plan(s) Linked
Caregiver Services	0 Service(s) Linked
Exceptions Information	Provided
Independent Living Information	Provided
Court/Signature Details	0 Signature(s) Provided
Family Participation	Provided

Finalize Case Plan

Note: Clicking the **Finalize Case Plan** button will make this Case Plan your current Case Plan **Finalize Case Plan**

Close

# Creating a Recommended Case Plan

## Generating a Recommended Case Plan Report

1. To generate a Case Plan, click the **Reports** link in the appropriate row.



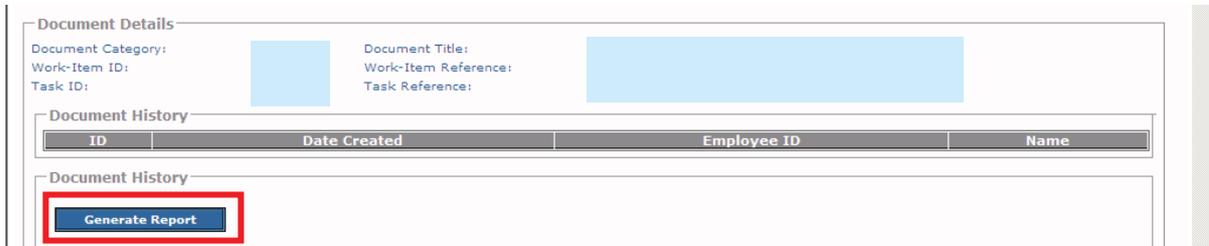
The **Available Documents** screen appears.

2. In the **Available Document** field, select the appropriate report.
3. Click the **Select** button.



The **Document Details** screen appears.

4. Click the **Generate Report** button.



The **JFS 1410 Maintain Case Plan** screen appears.

5. Select **Caseworker** name.
6. Click the **Generate Report** button.



The report appears. It can be printed and/or saved.

# Creating a Recommended Case Plan

## Finalizing the Recommended Case Plan

**Important:** On recommended case plans, all work items can be edited after supervisor approval until the point of finalization. Once the case plan is finalized, no edits can be made with the exception of the **Signature** screen.

1. Once the court approves the **Recommended Case Plan**, navigate to the **Case Plans** screen.
2. Click the **Edit** link in the row with the **Approved** recommended case plan.

The screenshot shows a web application interface with a sidebar on the left containing various menu items like 'Specialized A/I Tool', 'Law Enforcement', 'Justification/Waiver', 'Case Services', 'Legal Actions', 'Legal Custody/Status', 'Living Arrangement', 'Initial Removal', 'Placement Request', 'Placement', 'Visitation Plans', 'Independent Living', 'AR Family Service Plan', 'AR Family Service Review', and 'Case Plan'. The main content area is titled 'Case Plans' and shows 'Result(s) 1 to 3 of 3'. It contains a table with columns: Type, Plan, Status, Approved Date, File Date, and Agency. The first row is highlighted in light blue and has an 'edit' link circled in red. The second row is also highlighted in light blue. The third row is not highlighted. Below the table is an 'Add Case Plan' button.

Type	Plan	Status	Approved Date	File Date	Agency
Initial recommended	3.00 - R1	Approved	11/20/2012		County Children Services Board
Initial	2.00	Approved	10/26/2012		County Children Services Board
Closed	1.07	Approved	01/11/2008		County Children Services Board

The **Case Plan Topics** screen appears.

3. Click **Finalize Case Plan** button.

The screenshot shows a web application interface titled 'Case Plan Topics'. It displays 'Case Plan Type: Initial', 'Plan Number: 3.00 - R1', and 'Status: Approved'. Below this is a table with columns 'Topic' and 'Status'. The table lists various topics and their corresponding status. At the bottom, there is a 'Finalize Case Plan' section with a note: 'Note: Clicking the Finalize Case Plan button will make this Case Plan your current Case Plan'. The 'Finalize Case Plan' button is highlighted with a red box. A 'Close' button is also visible at the bottom left.

Topic	Status
Identifying Information	Provided
Strengths and Concerns	1 Strength(s) / 1 Concern(s) Records Entered
Placement Information	Provided
Placement Visitation	1 Visitation Plan(s) Linked
Caregiver Services	0 Service(s) Linked
Exceptions Information	Provided
Independent Living Information	Provided
Court/Signature Details	0 Signature(s) Provided
Family Participation	Provided

A listing of unresolved issues may appear as shown in green on the next page.

## Creating a Recommended Case Plan

Finalize Case Plan Topics

Location	Message
Care Service Linked	The Caregiver Service needs to be linked to one Service Record.
Identifying Information	Current and recommended Agency Legal Status selections do not match for child

[Close](#)

4. Correct all unresolved issues in SACWIS.

**Example:** After the **Finalize Case Plan** button is clicked, if the current **Agency Legal Status** or **Placement Type** does not match the **Recommended Agency Legal Status** field or **Recommended Placement Type** field, a validation message appears showing what needs to be corrected.

In this situation, the **Recommended Agency Legal Status** information needs to be updated in SACWIS prior to the case plan being finalized.

**Important:** Once the Placement Type is updated, remember to link the caregiver service to the recommended case plan.

5. Once all issues are resolved, click **Finalize Case Plan** button again.

Specialized A/I Tool  
 Law Enforcement  
 Justification/Waiver  
 Case Services  
 Legal Actions  
 Legal Custody/Status  
 Living Arrangement  
 Initial Removal  
 Placement Request  
 Placement  
 Visitation Plans  
 Independent Living  
 AR Family Service Plan  
 AR Family Service Review  
 Case Plan

Case Plans  
 Result(s) 1 to 3 of 3  
 Page 1 of 1

Type	Plan	Status	Approved Date	File Date	Agency
<a href="#">view</a> Initial	3.00	<a href="#">Approved</a>	11/20/2012		County Children Services Board
<a href="#">copy</a>					
<a href="#">reports</a>	<a href="#">amend plan</a>   <a href="#">history</a>				
<a href="#">view</a> Initial	2.00	<a href="#">Approved</a>	10/26/2012		County Children Services Board
<a href="#">copy</a>					
<a href="#">reports</a>	<a href="#">amend plan</a>   <a href="#">history</a>				
<a href="#">view</a> Closed	1.07	<a href="#">Approved</a>	01/11/2008		County Children Services Board
<a href="#">copy</a>					
<a href="#">reports</a>	<a href="#">history</a>				

[Add Case Plan](#)

The **Case Plan Filter Criteria** screen appears displaying the **Case Plan** grid with the type changed to **Initial**.

# Creating a Recommended Case Plan

## Copying a Case Plan

In SACWIS, multiple recommended case plans can be created for the same amendment version by clicking the **Copy** link next to the existing recommended case plan. The added case plans display with an R1, R2, etc. The information that copies over can be changed.

1. Navigate to the **Case Plan** screen.
2. Click the **Copy** link next to any recommended type of case plan.

The screenshot shows the 'Case Plans' screen in SACWIS. On the left is a navigation menu with links such as 'Specialized A/I Tool', 'Law Enforcement', 'Justification/Waiver', 'Case Services', 'Legal Actions', 'Legal Custody/Status', 'Living Arrangement', 'Initial Removal', 'Placement Request', 'Placement', 'Visitation Plans', 'Independent Living', 'AR Family Service Plan', 'AR Family Service Review', and 'Case Plan'. The main content area displays a table of case plans. The table has columns for 'Type', 'Plan', 'Status', 'Approved Date', 'File Date', and 'Agency'. There are two rows of data. The first row is for an 'Amended recommended' case plan with Plan ID '1.11 - R1', Status 'Approved', and Approved Date '10/16/2012'. The 'copy' link for this row is highlighted with a red box. The second row is for an 'Amended' case plan with Plan ID '1.10', Status 'Approved', and Approved Date '06/13/2012'. Below the table is an 'Add Case Plan' button. The page number 'Page 1 of 1' is visible in the top right corner.

Type	Plan	Status	Approved Date	File Date	Agency
Amended recommended	1.11 - R1	Approved	10/16/2012		County Department of Job and Family Services
Amended	1.10	Approved	06/13/2012		County Department of Job and Family Services

The **Identifying Information** screen appears.

3. Complete the steps at the beginning of this Knowledge Base Article to enter information into the fields.

## Creating a Recommended Case Plan

### Finalizing a Case Plan When Multiple Versions of the Amendment Exist

After a **Recommended Case Plan** is copied, multiple versions of the same amendment (R1, R2, etc) will appear in the **Case Plans** grid. **However, the court will only approve one version of the case plan and that version will be finalized.**

When one recommended version is finalized, the remaining approved recommended case plan(s) will remain in the **Case Plans** grid until you mark the **Court Status** as **Declined**. This is completed on the **Case Plan Signature** screen. The **Declined Recommended Case Plan(s)** will then go into the **Case Plan History** and only be viewable when included in the **Case Plan Filter Criteria** grid. Additionally, R1 becomes Amendment 1.11 when finalized, as shown below.

Specialized A/I Tool  
[Law Enforcement](#)  
[Justification/Waiver](#)  
[Case Services](#)  
[Legal Actions](#)  
[Legal Custody/Status](#)  
[Living Arrangement](#)  
[Initial Removal](#)  
[Placement Request](#)

Case Plans  
 Result(s) 1 to 3 of 3 Page 1 of 1

	Type	Plan	Status	Approved Date	File Date	Agency
<a href="#">edit</a> <a href="#">copy</a> <a href="#">reports</a>	Amended recommended	1.11 - R2	Approved	11/27/2012		Department of Job and Family Services
<a href="#">edit</a> <a href="#">copy</a> <a href="#">reports</a>	Amended recommended	1.11 - R1	Approved	10/16/2012		Department of Job and Family Services

Specialized A/I Tool  
[Law Enforcement](#)  
[Justification/Waiver](#)  
[Case Services](#)  
[Legal Actions](#)  
[Legal Custody/Status](#)  
[Living Arrangement](#)  
[Initial Removal](#)  
[Placement Request](#)  
[Placement](#)  
[Visitation Plans](#)  
[Independent Living](#)

Case Plans  
 Result(s) 1 to 2 of 2 Page 1 of 1

	Type	Plan	Status	Approved Date	File Date	Agency
<a href="#">view</a> <a href="#">reports</a>	Amended recommended	1.11 - R2	Approved	11/27/2012		Department of Job and Family Services
<a href="#">view</a> <a href="#">copy</a> <a href="#">reports</a>	Amended	1.11	Approved	10/16/2012		Department of Job and Family Services

[amend plan](#) | [history](#) |

[Add Case Plan](#)

# Creating a Recommended Case Plan

## Viewing all Case Plans (Finalized and Unfinalized)

To view unfinalized approved recommended case plans with a court status of declined or not applicable, complete the following steps:

1. Navigate to the appropriate **Case Plan Filter Criteria** screen.
2. Click the **Include** radio button.
3. Click the **Filter** button.

The screenshot shows the 'Case Plan Filter Criteria' form. The 'Status' dropdown is set to 'Approved'. The 'Sort Results By' dropdown is set to 'Approved Date (Descending)'. The radio buttons for 'Recommended Case Plans with a Court Status of Declined or Not Applicable' are set to 'Include'. The 'Filter' button is circled in red. Below the form, the 'Case Plans' grid is visible, showing two results:

	Type	Plan	Status	Approved Date	File Date	Agency
<a href="#">edit</a> <a href="#">copy</a> <a href="#">reports</a>	Amended recommended	1.11 - R1	Approved	10/16/2012		Department of Job and Family Services
<a href="#">view</a> <a href="#">copy</a> <a href="#">reports</a>	Amended	1.10	Approved	06/13/2012		Department of Job and Family Services

All case plans appear in the **Case Plans** grid.

## Viewing only Finalized Case Plans and Current Recommended Case Plans

1. Click the **Exclude** radio button.
2. Click the **Filter** button.

The screenshot shows the 'Case Plan Filter Criteria' form. The 'Sort Results By' dropdown is set to 'Approved Date (Descending)'. The radio buttons for 'Recommended Case Plans with a Court Status of Declined or Not Applicable' are set to 'Exclude'. The 'Filter' button is circled in red. Below the form, the 'Case Plans' grid is visible, showing one result:

	Type	Plan	Status	Approved Date	File Date	Agency
<a href="#">view</a> <a href="#">copy</a> <a href="#">reports</a>	Amended	1.11	Approved	10/16/2012		Department of Job and Family Services

All finalized case plans appear in the **Case Plans** grid.