Recording a Safety Plan

Knowledge Base Article

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

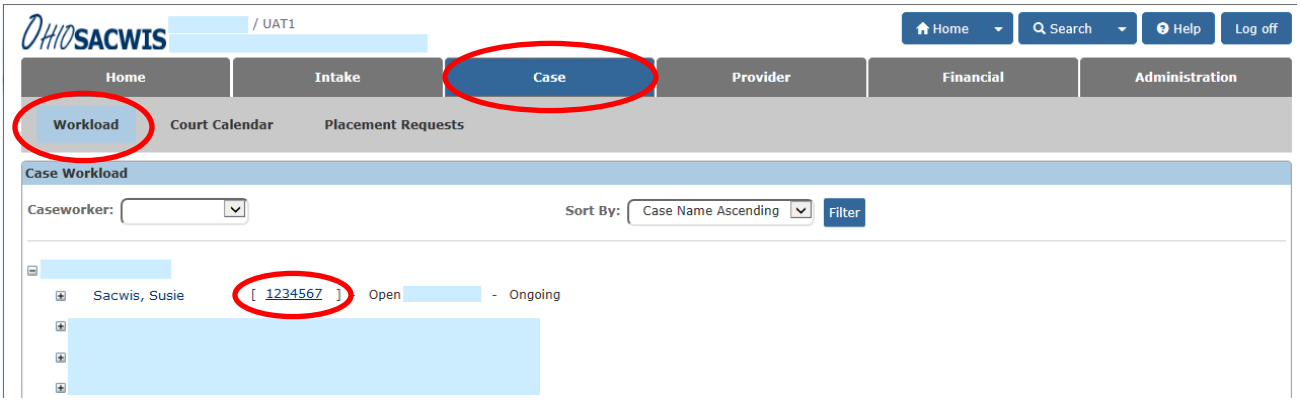
Overview

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

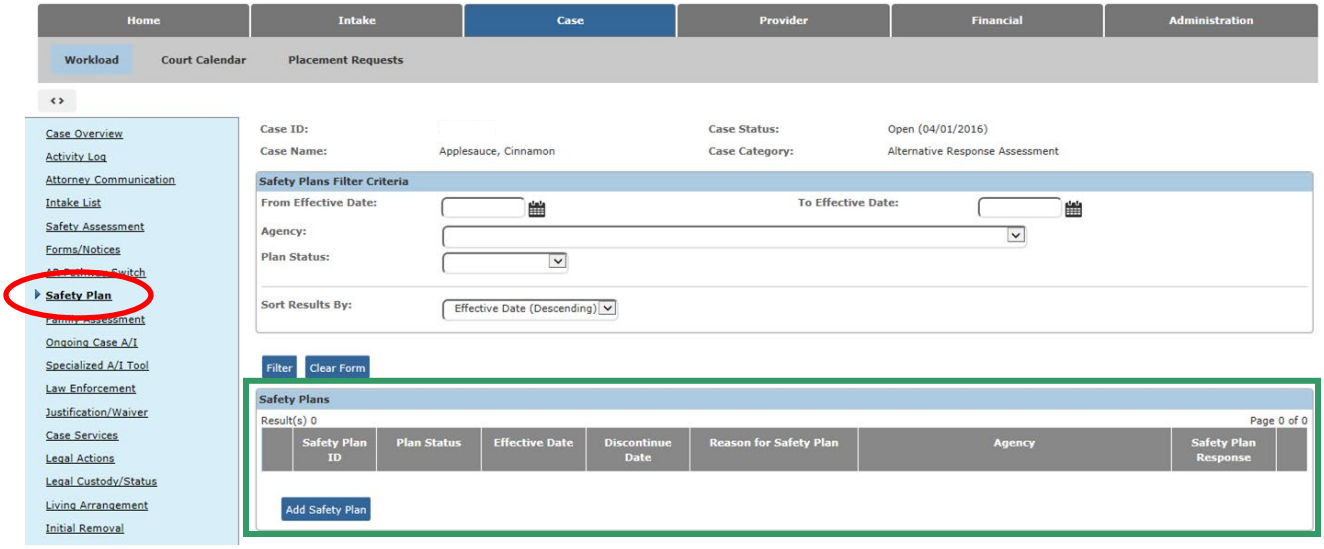
1. From the Ohio SACWIS **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Select the appropriate **Case ID** link.



The **Case Overview** screen appears.

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

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



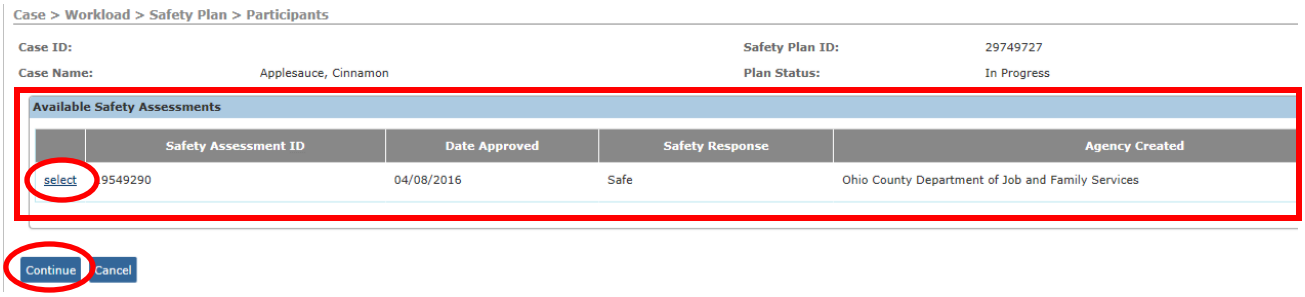
Creating a Safety Plan & Linking a Safety Assessment

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.

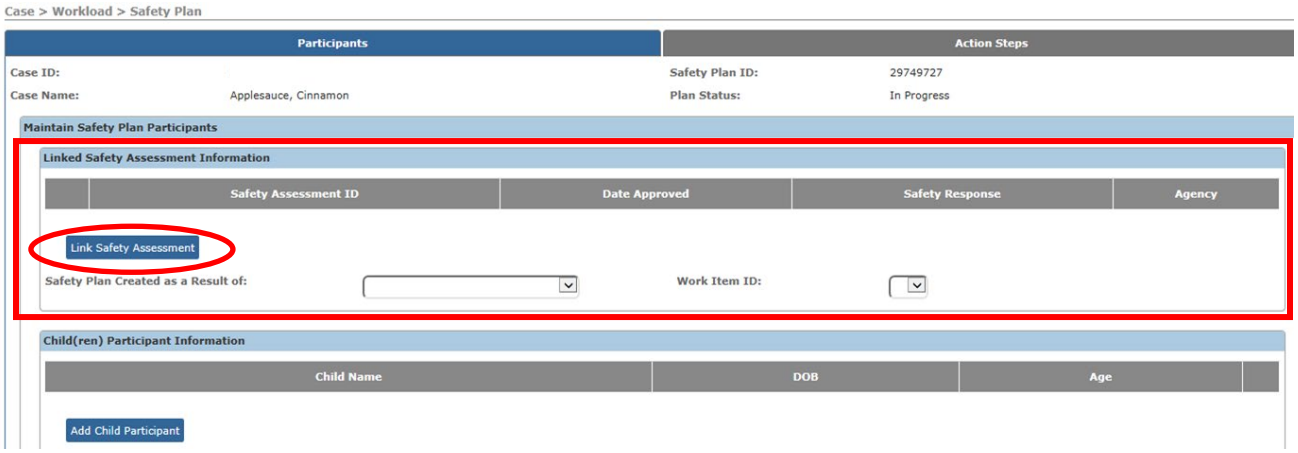
If any Safety Assessments are available to link to the Safety Plan, the **Available Safety Assessments** screen displays as shown on the next page. (If this screen does not appear, skip to **Step 3** below.)

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.



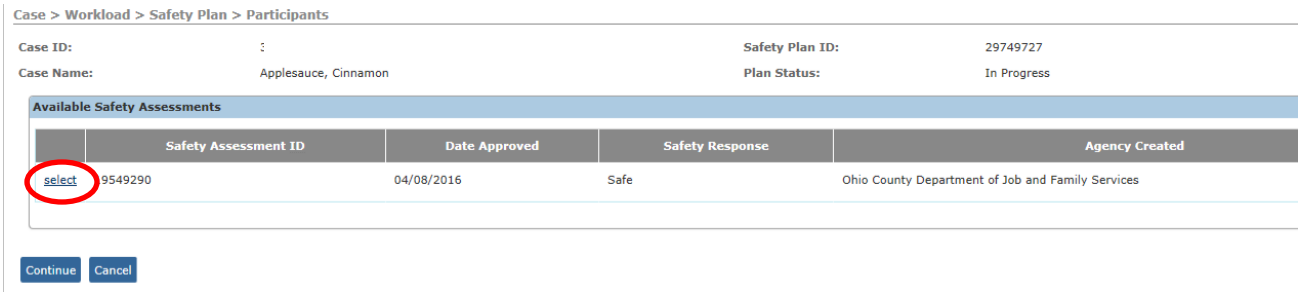
Note: You can also click the **Cancel** button to return to the **Safety Plans** list section without saving a Safety Plan record.

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.



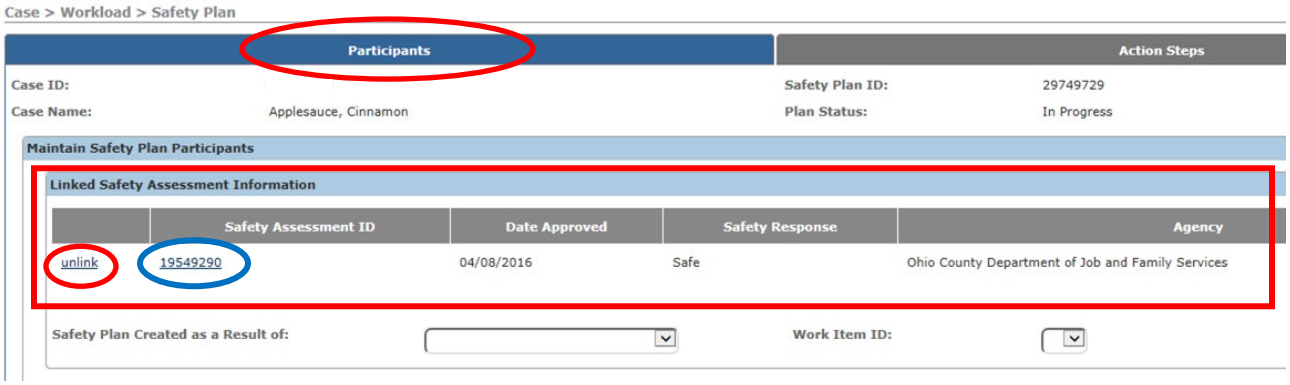
4. If you wish to link a Safety Assessment, click the **Link Safety Assessment** button.

The **Available Safety Assessments** screen appears.



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

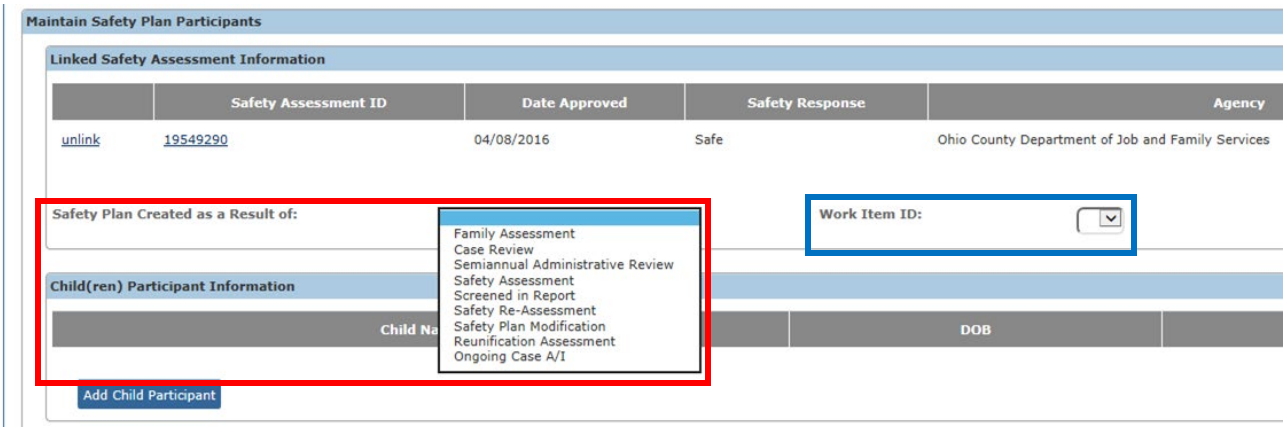
6. The **Participants** tab appears displaying the linked Safety Assessment.



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).

9. 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.



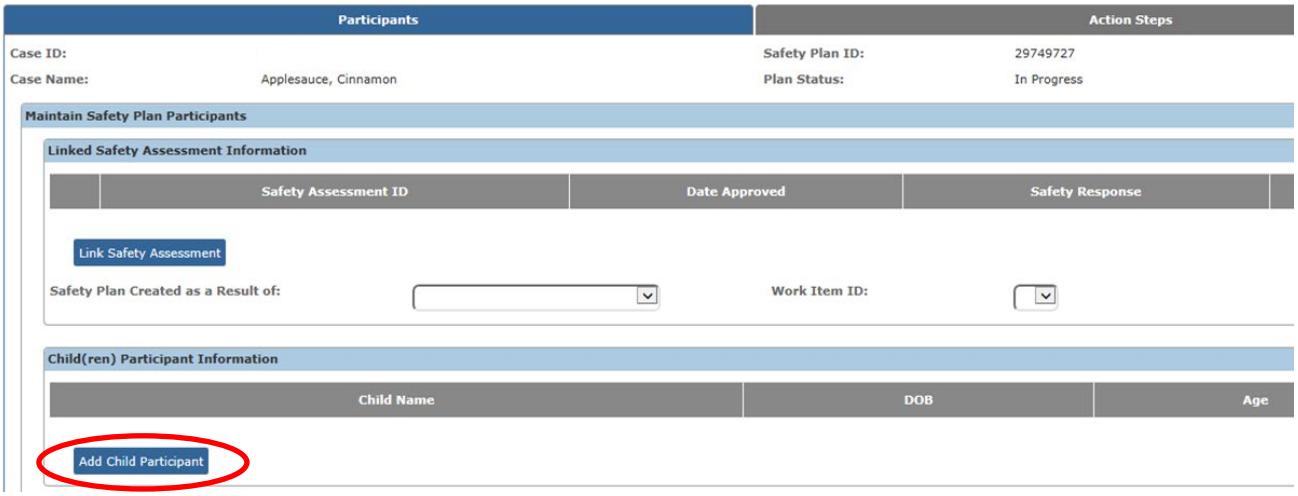
10. If you selected a value other than **Safety Assessment** or **Safety Plan Modification** in the previous step, then the **Work Item ID** field displays a list of corresponding work items available on the case. Select the appropriate **Work Item ID**. (Optional)
    - For example, if you selected **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.

Adding Participants to the Safety Plan

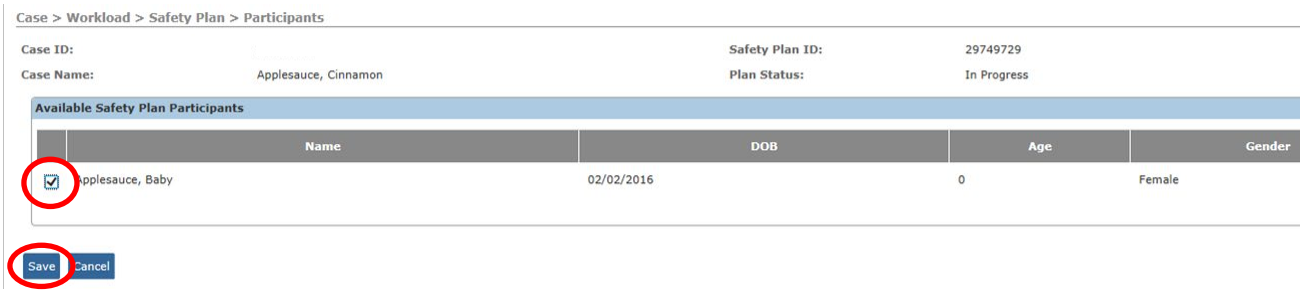
Complete the following steps to add the **Child Participants** and **Adult Participants** to the Safety Plan.

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



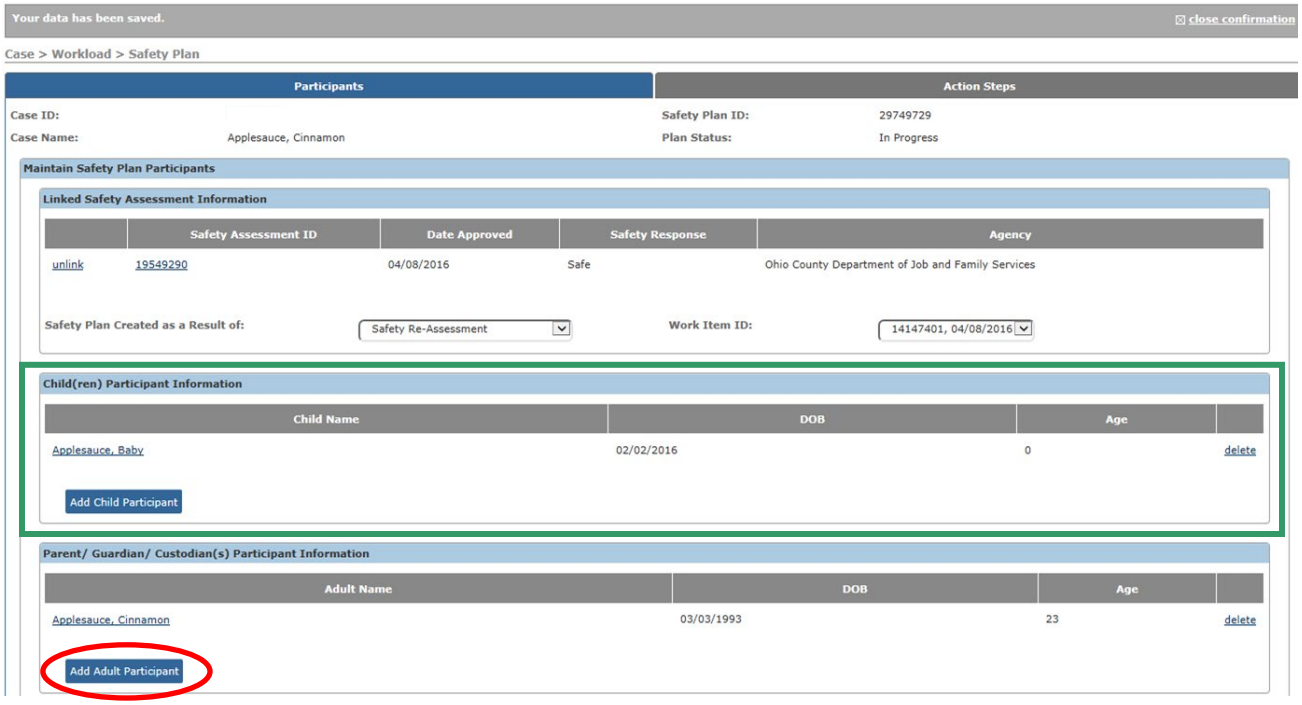
The **Available Safety Plan Participants** screen appears displaying the available case members.

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



3. Click the **Save** button.

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

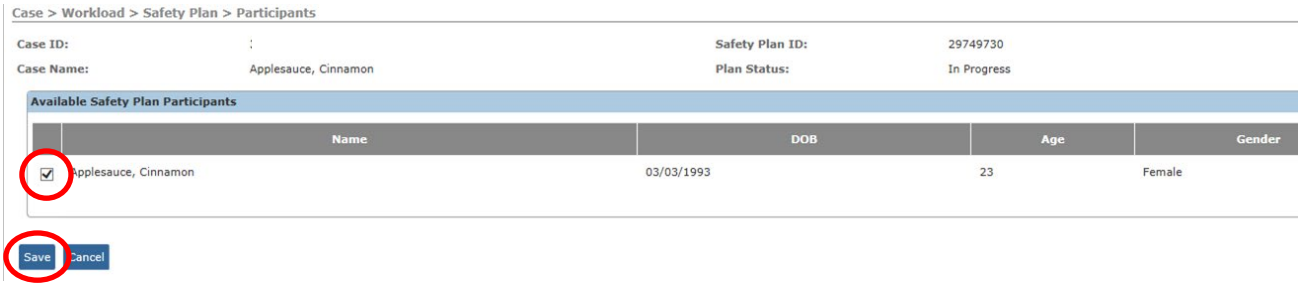


4. Click the **Add Adult Participant** button to select Parent/Guardian/Custodian(s) for the Safety Plan.

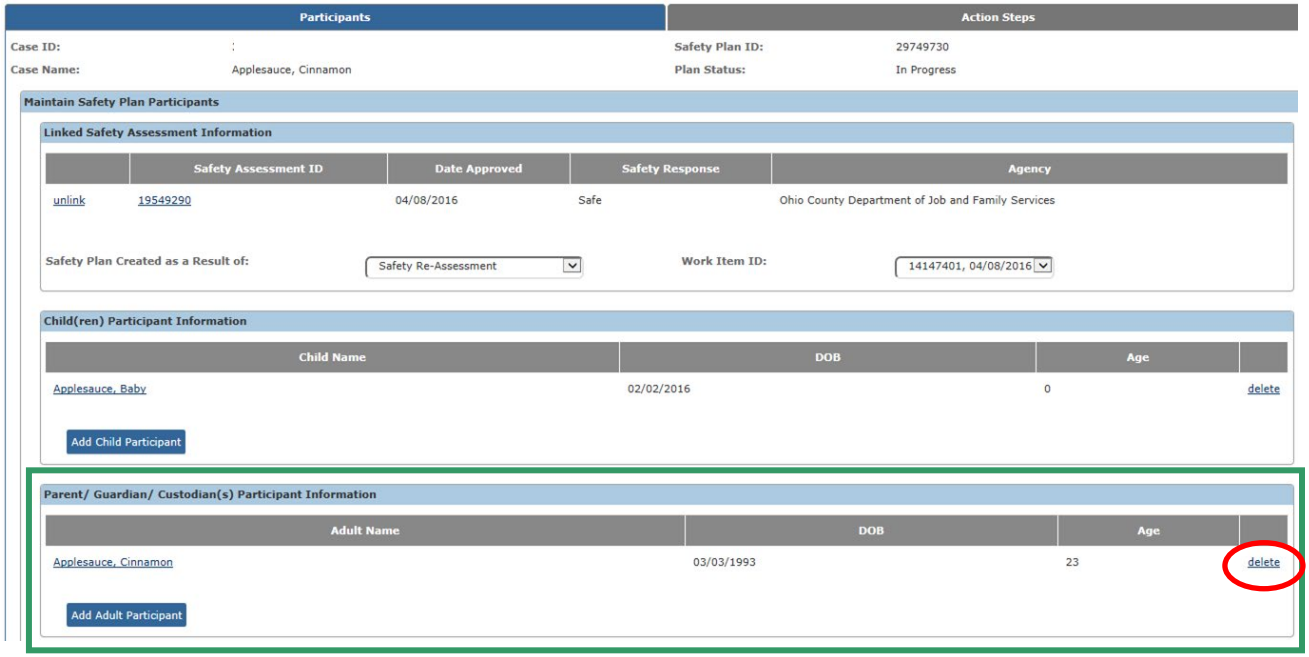
Note: The **Parent/ Guardian/ Custodian(s) Participant Information** section should include only Parent/Guardian/Custodian(s), not persons who will serve as Responsible Parties for any Safety Plan Action Step(s).

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.



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



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.

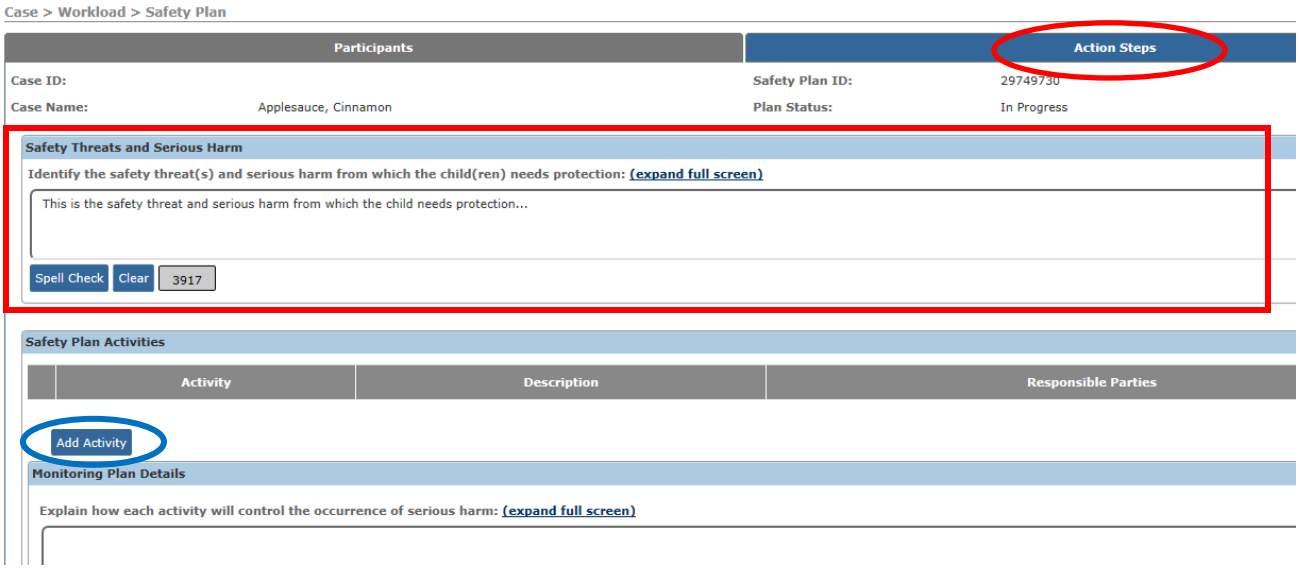
Completing the Action Steps Tab

Adding Safety Plan Activities

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

The **Action Steps** tab appears.

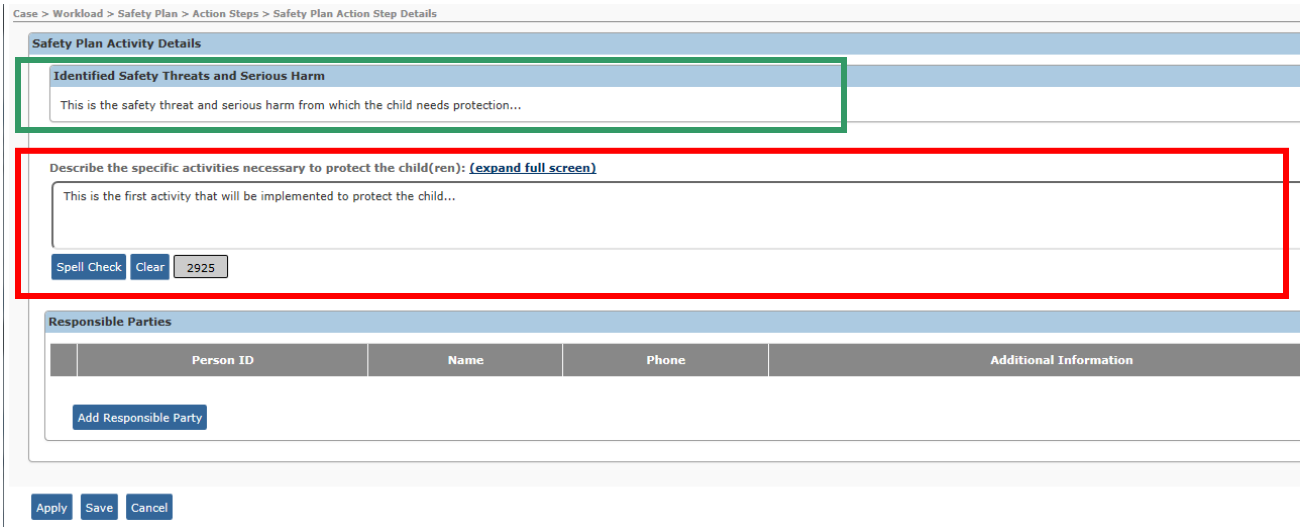
2. Enter the **Safety Threats and Serious Harm** narrative.



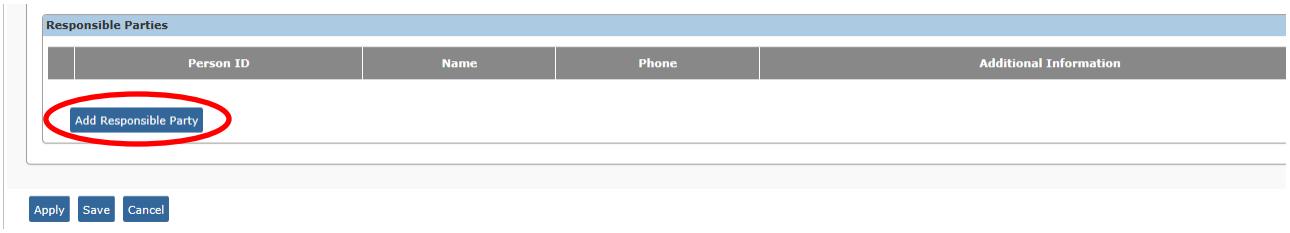
3. In the **Safety Plan Activities** section, click the **Add Activity** button.

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).

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

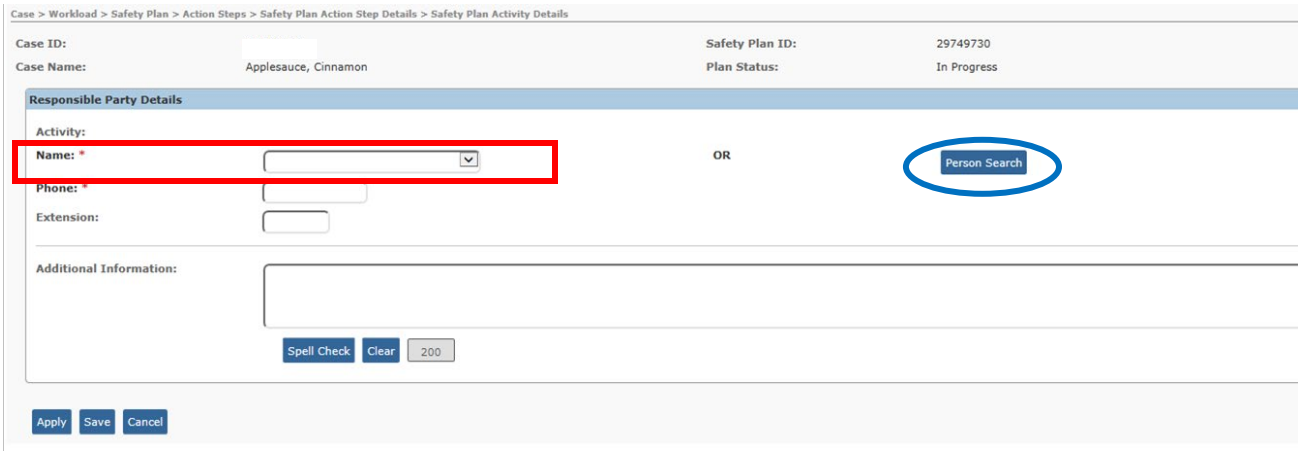


5. Click the **Add Responsible Party** button to add a responsible party for this activity.



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.



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.

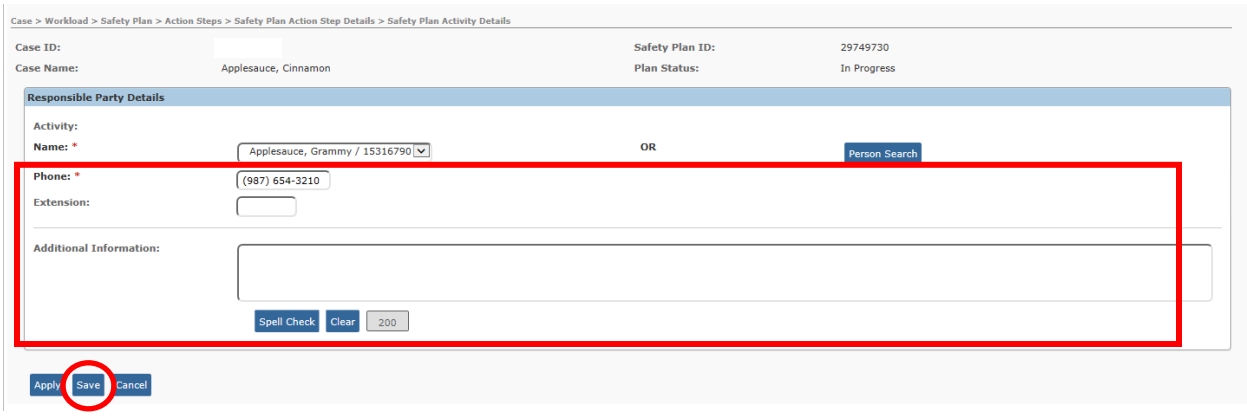
Note: Responsible Parties who are not already Case Members or Associated Persons are automatically added to the Case Associated Persons.

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)

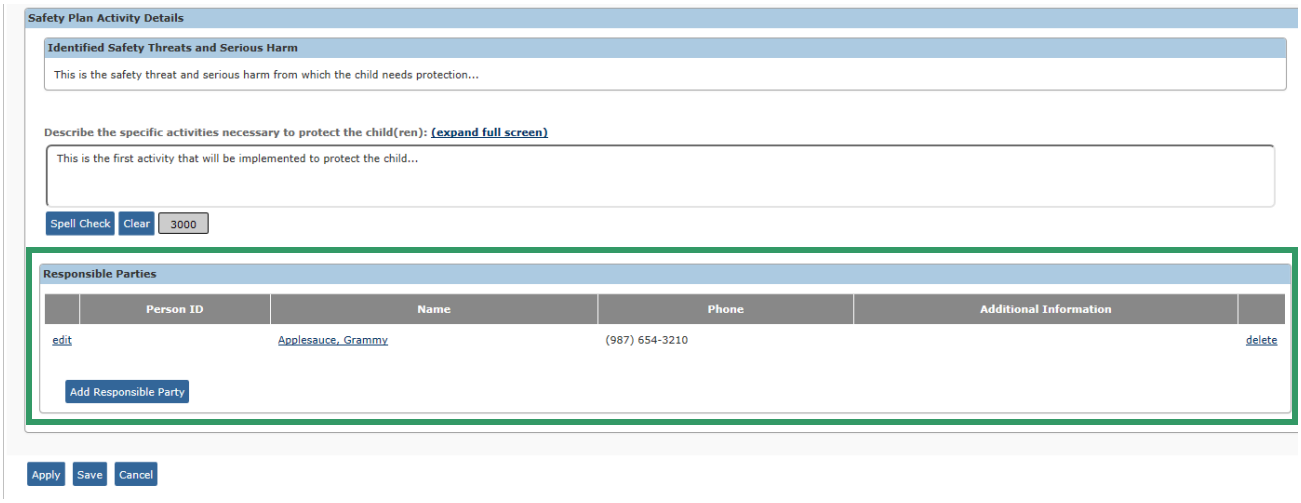
11. Enter the person's **Extension**, if applicable. (Optional)

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



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

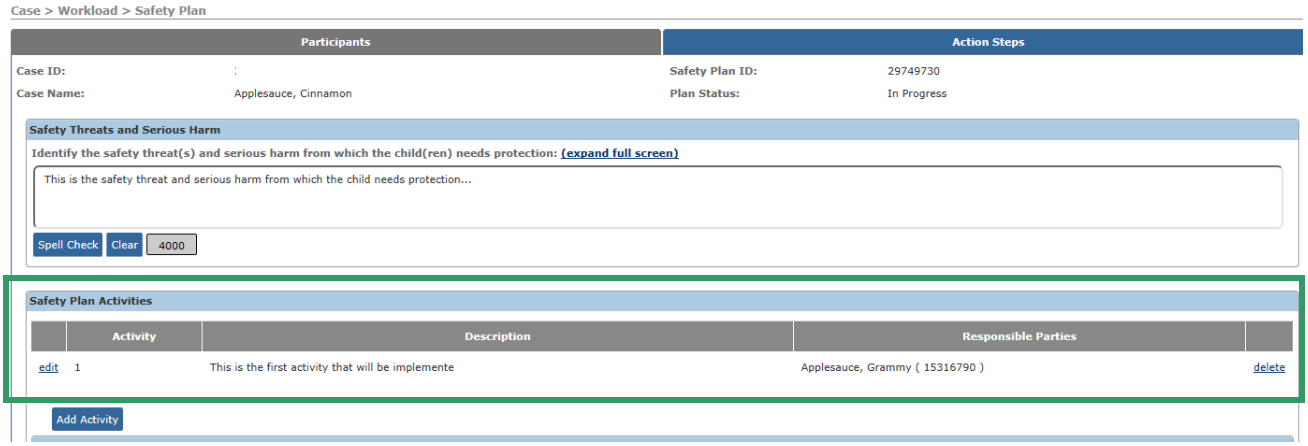
The **Safety Plan Activity Details** screen appears displaying the Responsible Party record.



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.



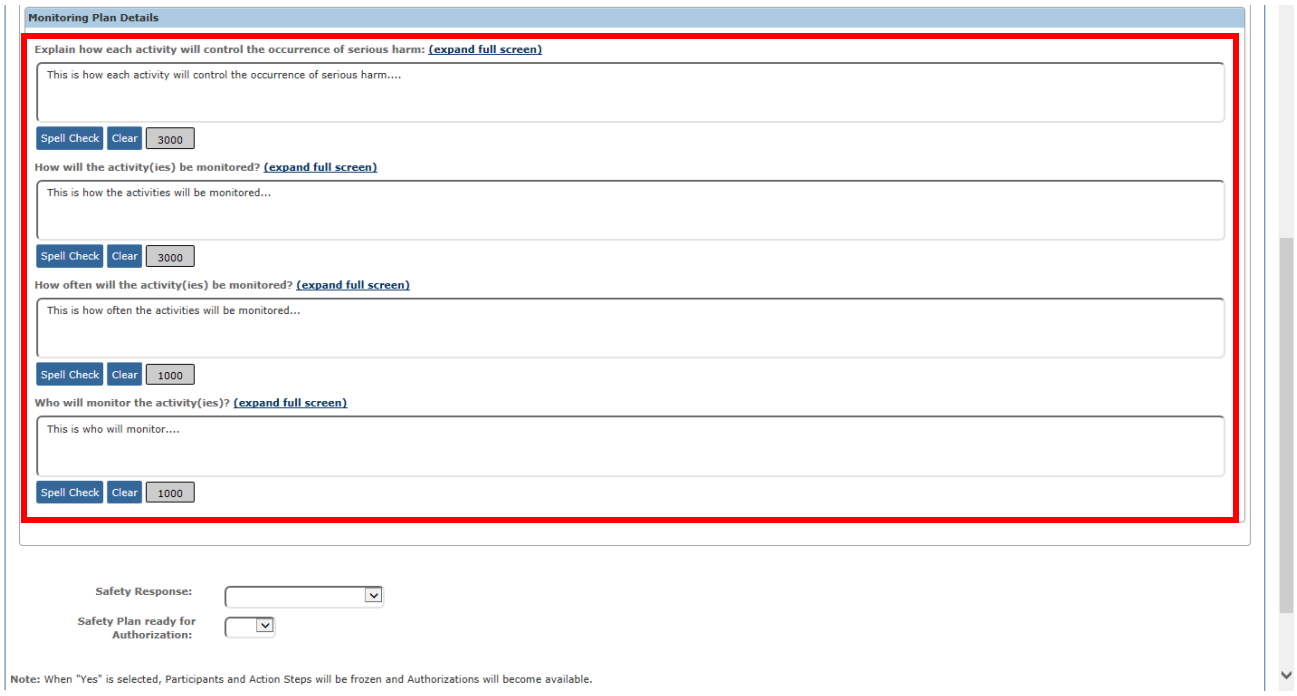
16. To edit or delete an activity, click the **Edit** link or the **Delete** link beside the appropriate activity as shown below.

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

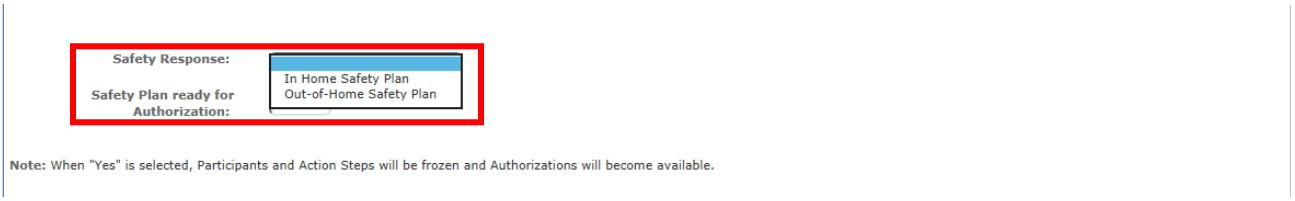
Continue to the next section to complete the Monitoring Plan Details.

Entering the Monitoring Plan Details and Safety Response

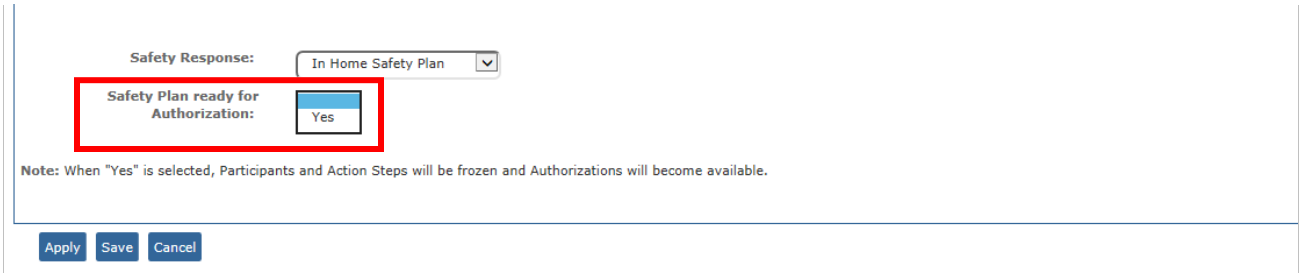
1. In the **Monitoring Plan Details** section of the **Action Steps** tab, record the appropriate narrative in the text fields:
   - **Explain how each activity will control the occurrence of serious harm**
   - **How will the activity(ies) be monitored?**
   - **How often will the activity(ies) be monitored?**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



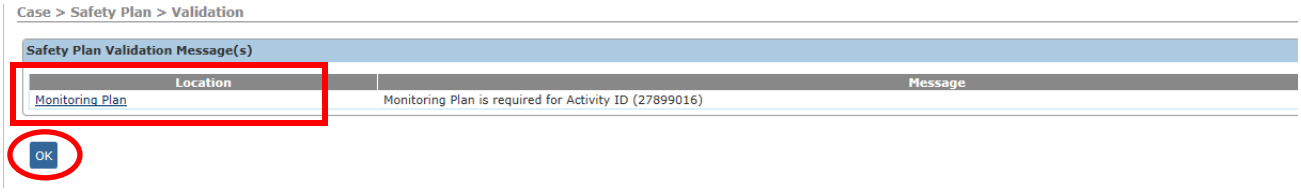
2. In the **Safety Response** field, select the appropriate value from the drop-down list to indicate whether this is an In-Home or Out-of-Home Safety Plan.



3. 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.

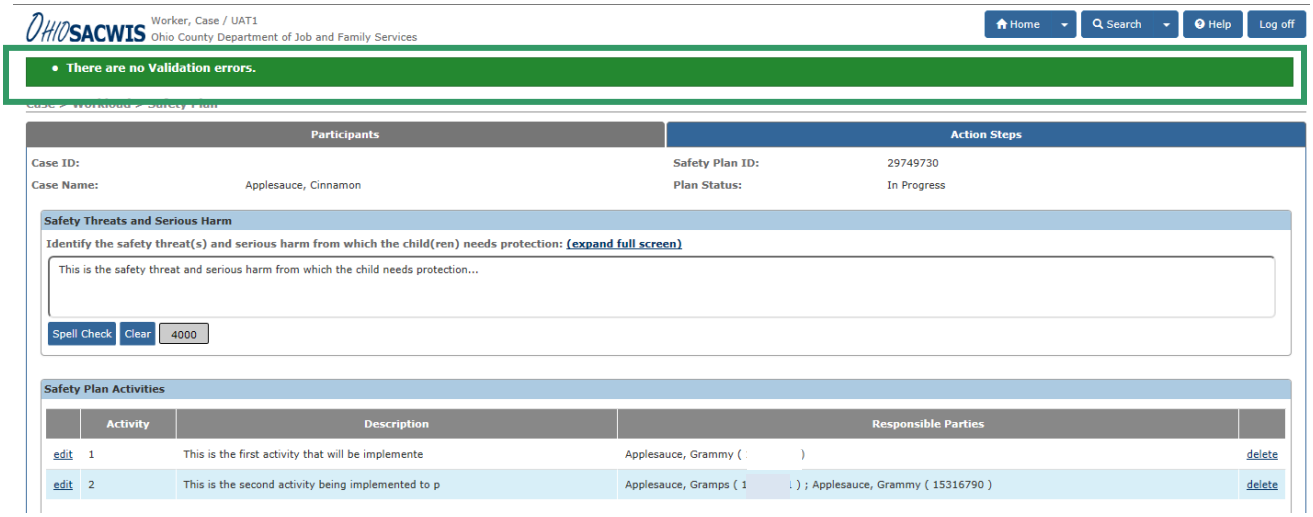


If any required fields have not been completed, the system will display a list of Validation Messages:



4. 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:

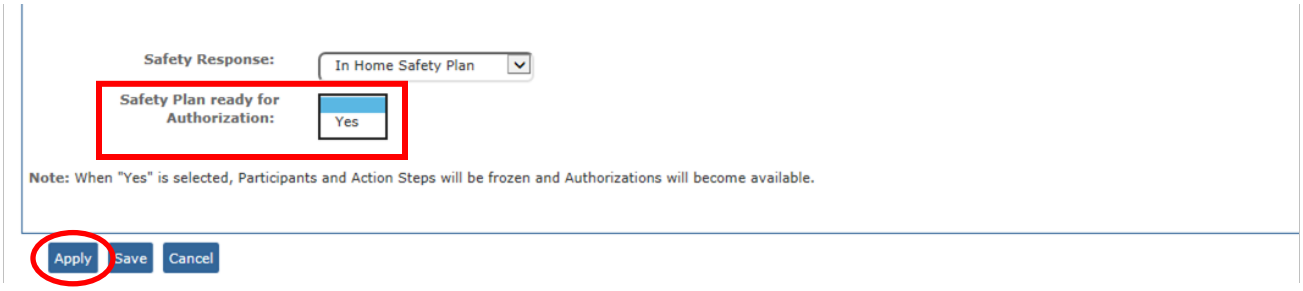


Note: When the Safety Plan is marked ready for Authorization and you click the **Apply** button or the **Save** button on the **Action Steps** tab, all information on the **Participants** and **Action Steps** tabs will be frozen and cannot be edited. The **Authorizations** tab will become available.

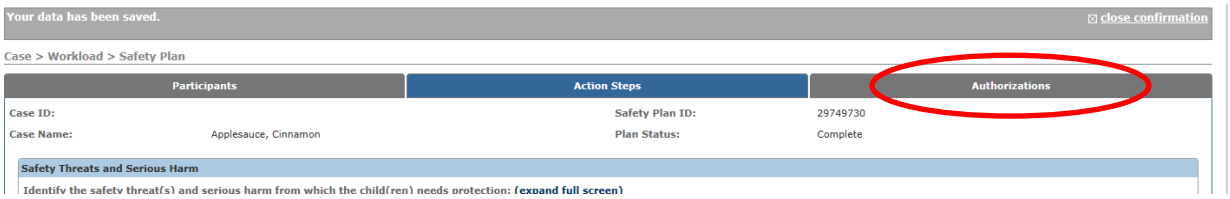
As long as no information has been recorded on the **Authorizations** tab, you can continue to edit the plan (by following the instructions in the next step below). Once any information has been documented on the **Authorizations** tab, however, no changes can be made to the content of the **Participants**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

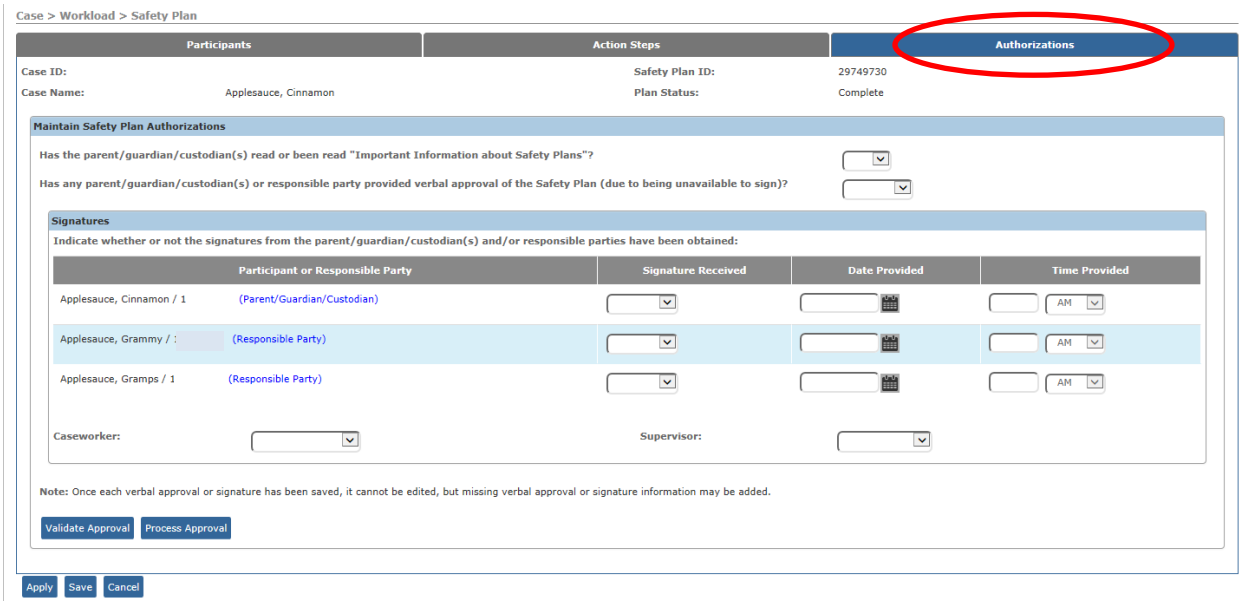


The **Authorizations** tab heading displays.



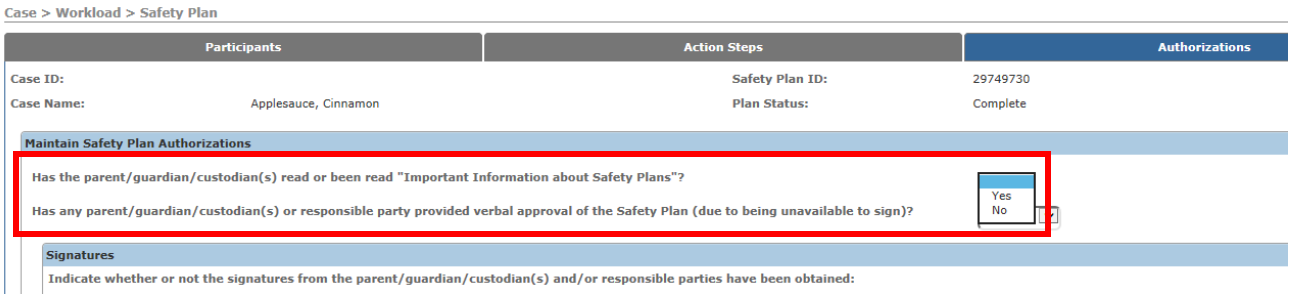
7. Click the **Authorizations** tab to record the verbal authorization and/or signature details.

The **Authorizations** tab appears.



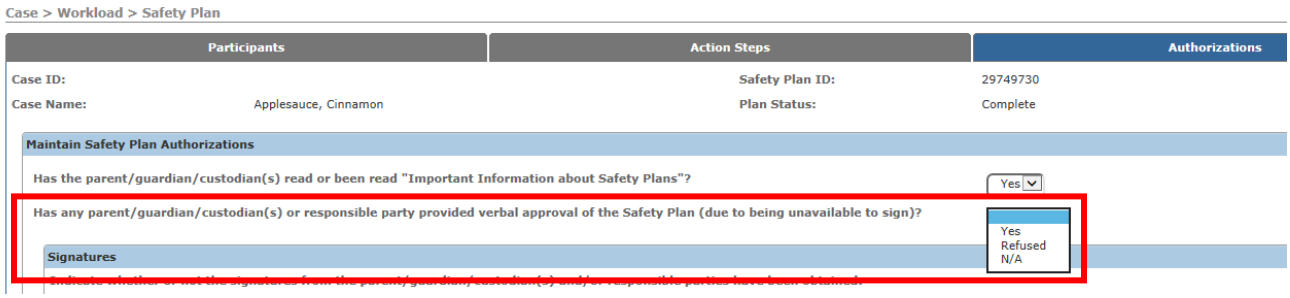
Note: When each verbal approval or signature has been saved, it cannot be edited. But any missing verbal approval or signature information may be added.

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"?**

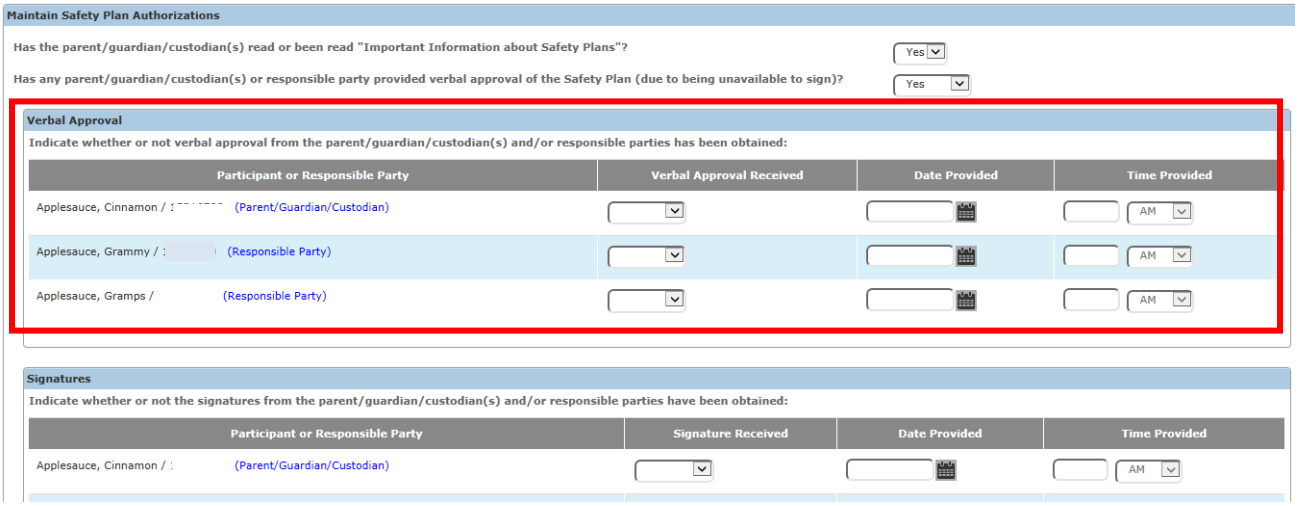


9. Select the applicable response from the drop-down list to answer the question **Has any parent/guardian/custodian(s) or responsible party provided verbal approval of the Safety Plan (due to being unavailable to sign)?**

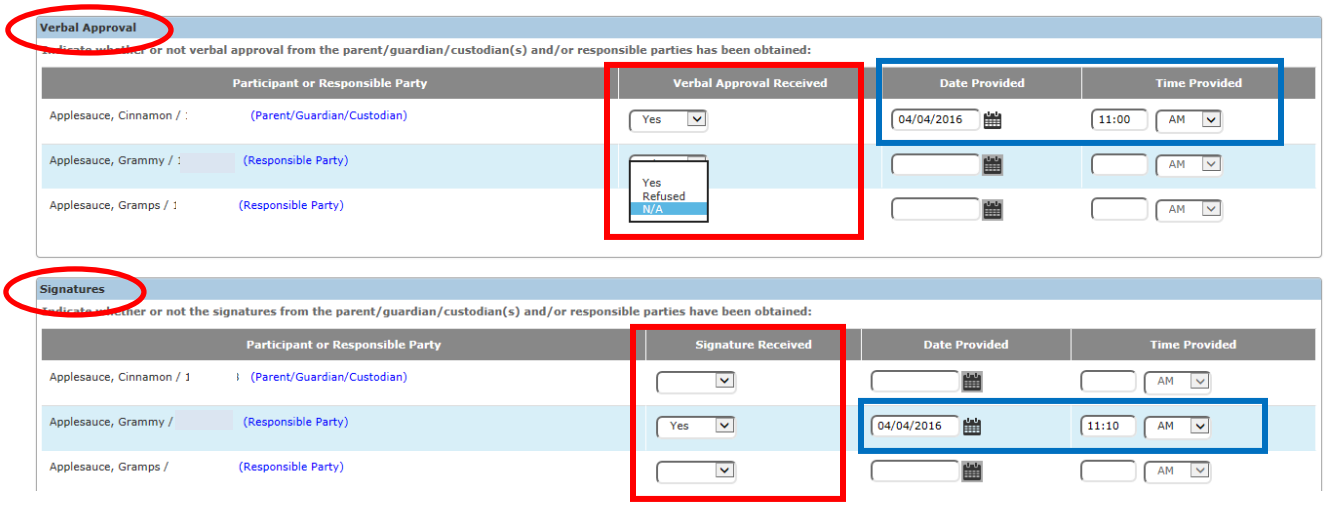
Note: If all parties were initially available to sign, it is not necessary to also record verbal agreement, and you may select the value **N/A** for this question.



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



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

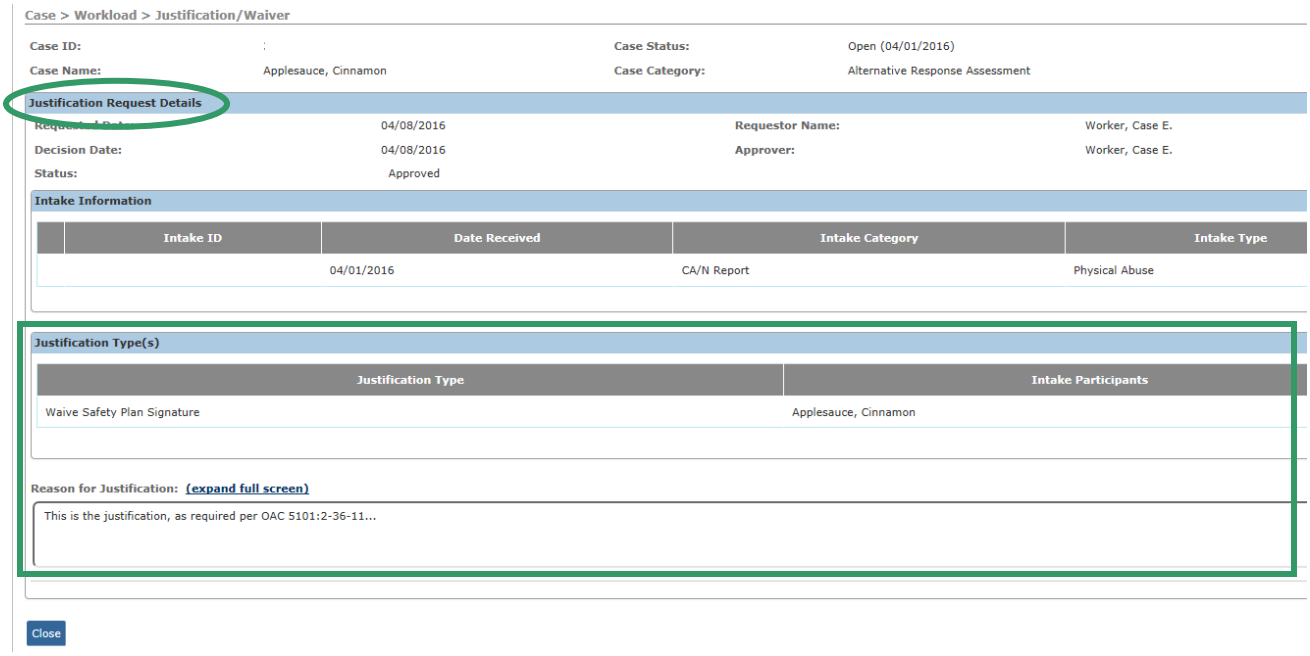


11. For each **Yes** or **Refused** response, record the **Date Provided** and the **Time Provided** (shown in blue above).

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**.



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.

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

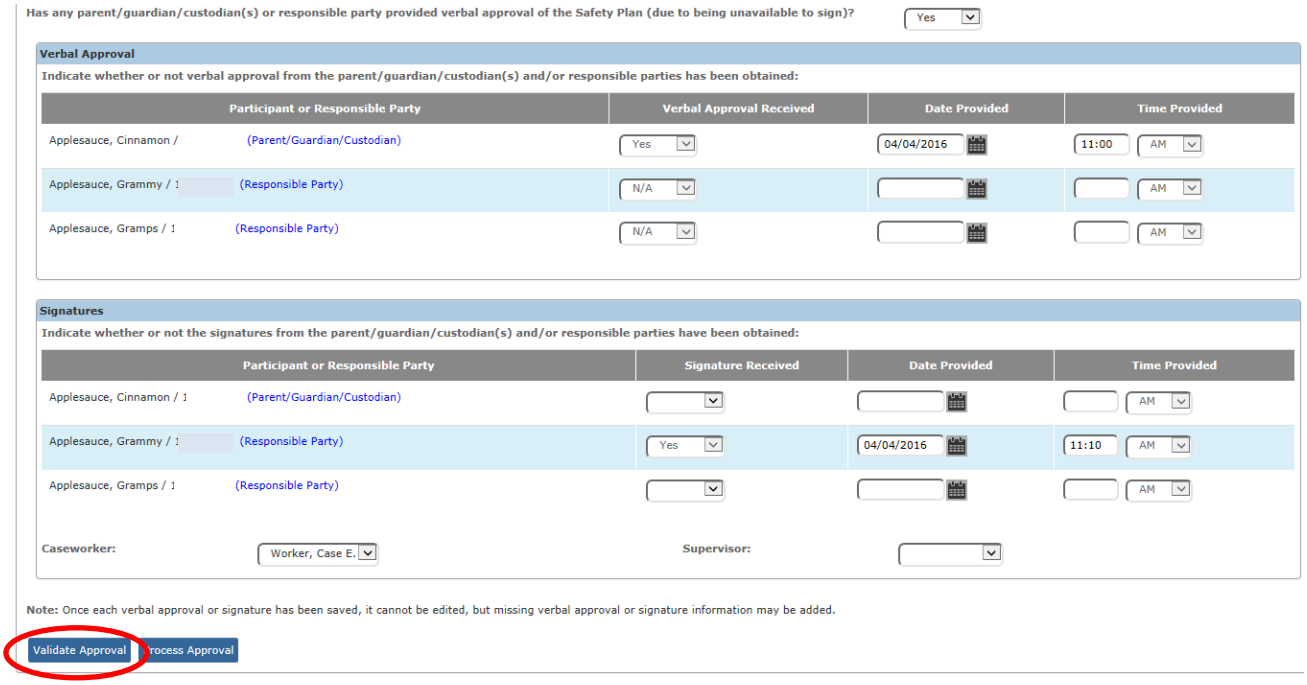
13. Select the **Supervisor** (if any) who signed the Safety Plan.

Recording a Safety Plan

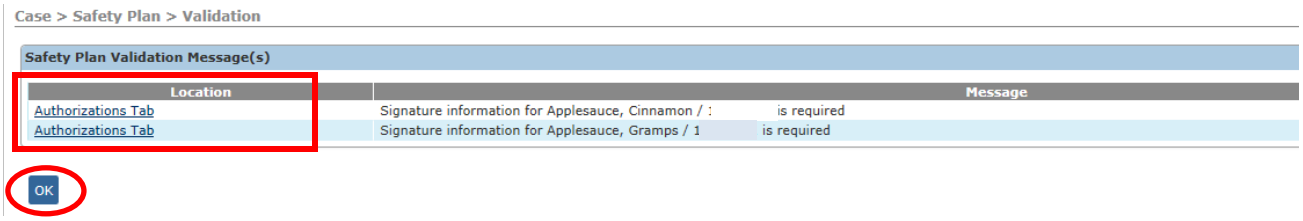
When a **Verbal Approval** or **Signature** has been obtained from each Participant and Responsible Party, and a **Caseworker** has been selected, the **Plan Status** will be updated to **Effective**.

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

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

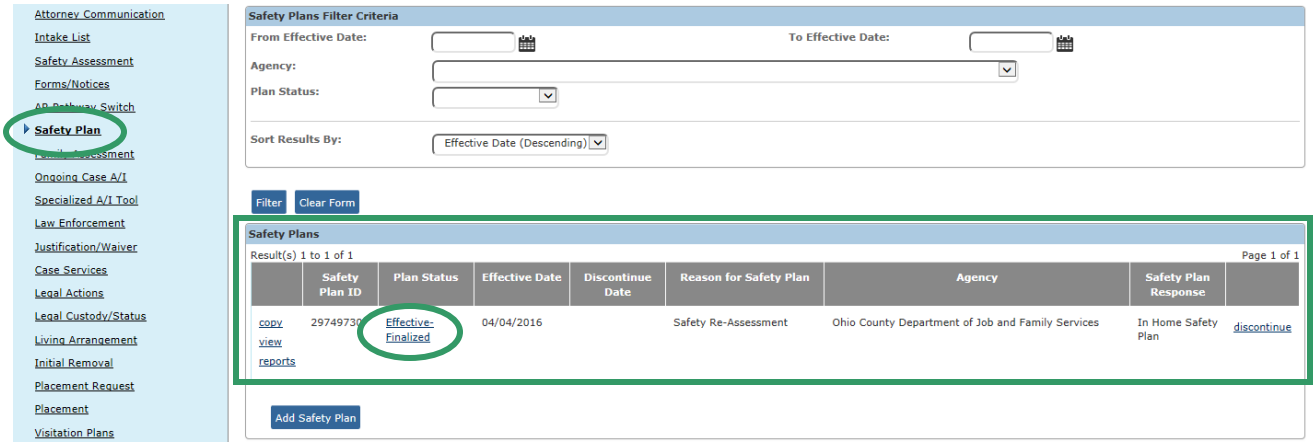


15. If any required information is missing on the **Authorizations** tab, a list of Validation Messages displays:



16. 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.

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

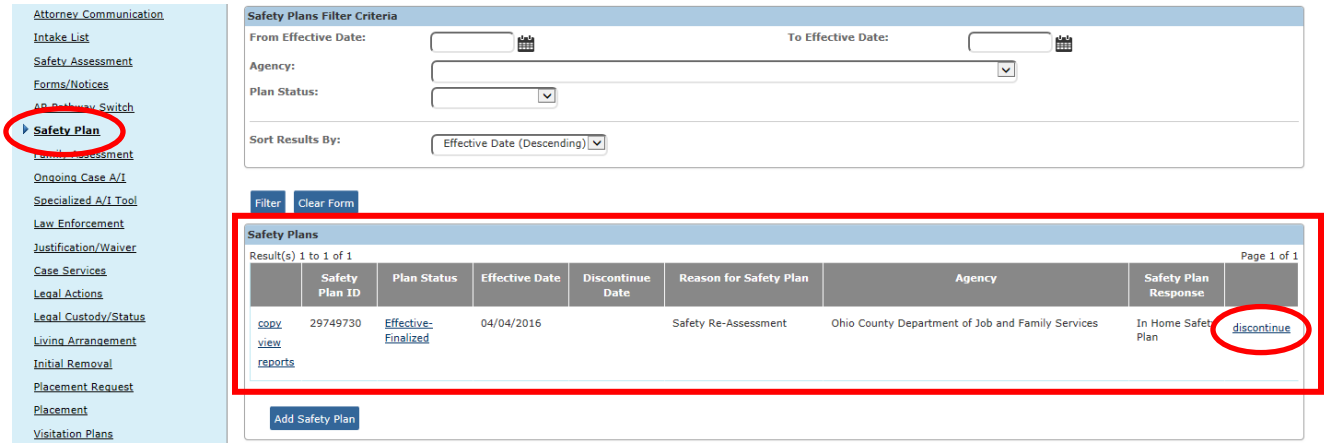


Discontinuing a Safety Plan

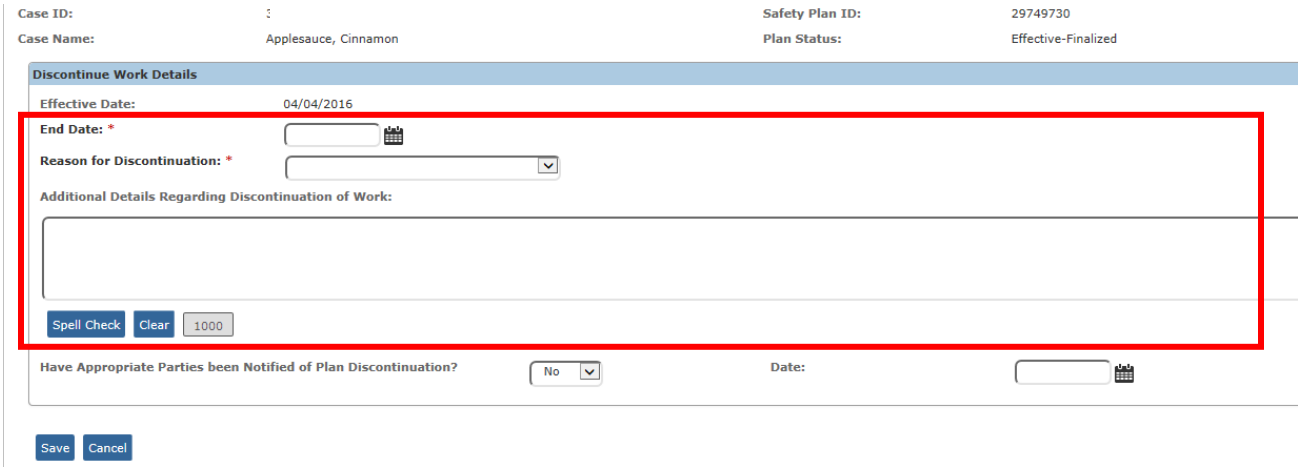
Complete the following steps if you wish to discontinue a Safety Plan.

1. Navigate to the **Safety Plans Filter Criteria** screen displaying the **Safety Plans** section using the steps previously discussed.

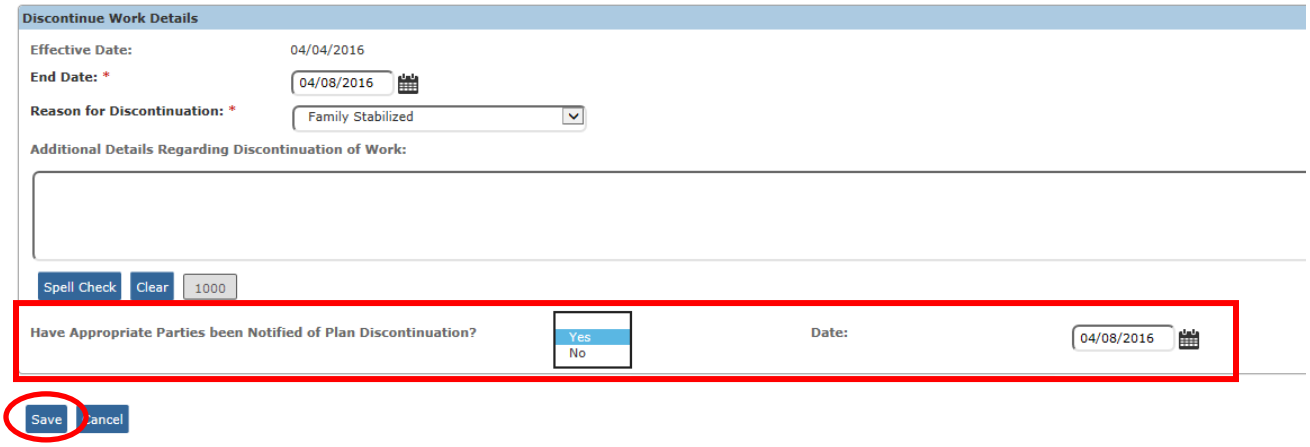
2. Click the **Discontinue** link to the right of the appropriate plan.



The **Discontinue Work Details** screen appears.



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.



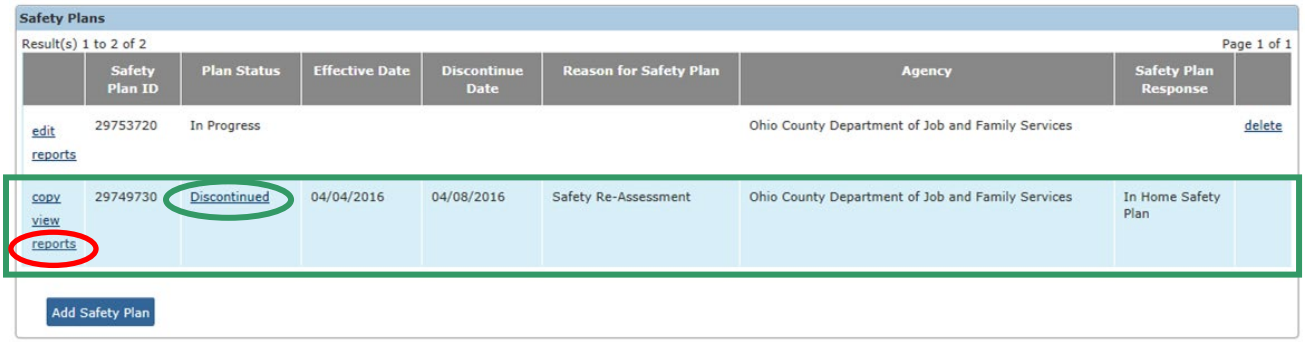
8. Click the **Save** button.

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

Generating a Notice of Safety Plan Discontinuation

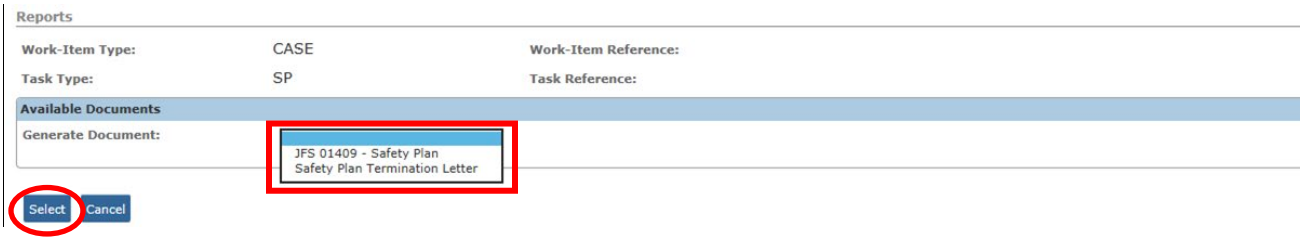
If you wish to generate a termination letter after Discontinuing a Safety Plan, complete the following steps.

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

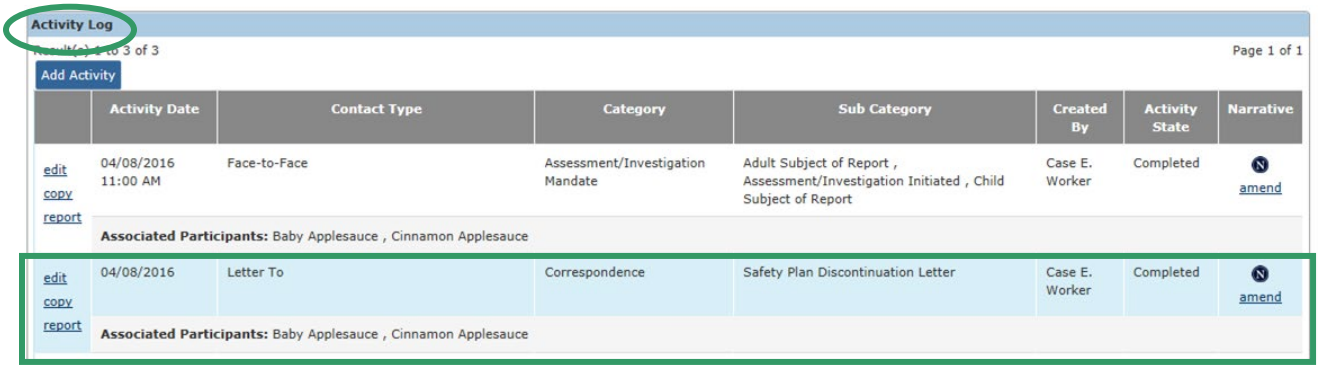


The **Reports** screen appears.

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

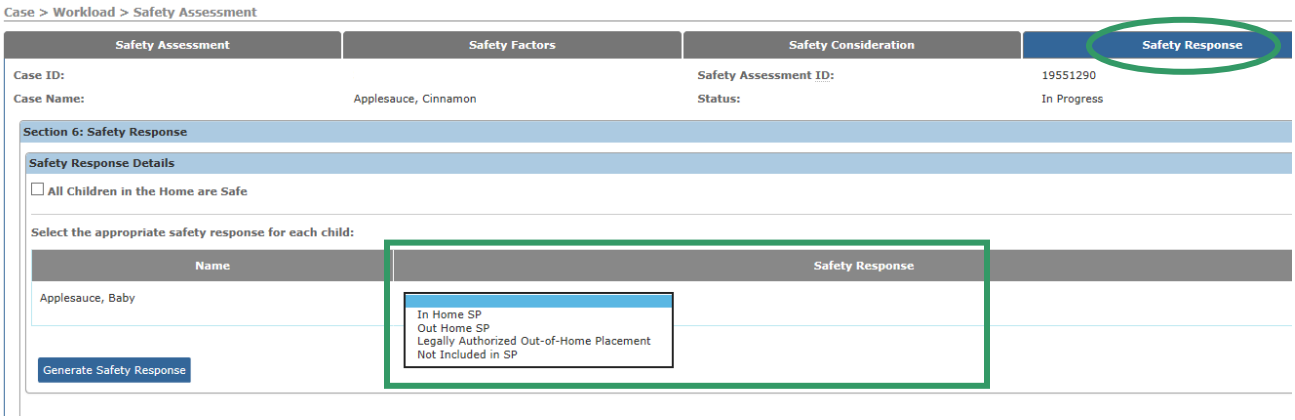


When the letter is generated and saved, the system automatically creates an **Activity Log** in the Case stating that the letter was generated:



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**.



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 need additional information or assistance, please contact the OFC Automated Systems Help Desk at SACWIS_HELP_DESK@jfs.ohio.gov .