

Adding Case Plan Signature Details

The **Signature Details** screen is available for case plans that have a status of **In Progress**, as well as case plans that have already been **Approved**.

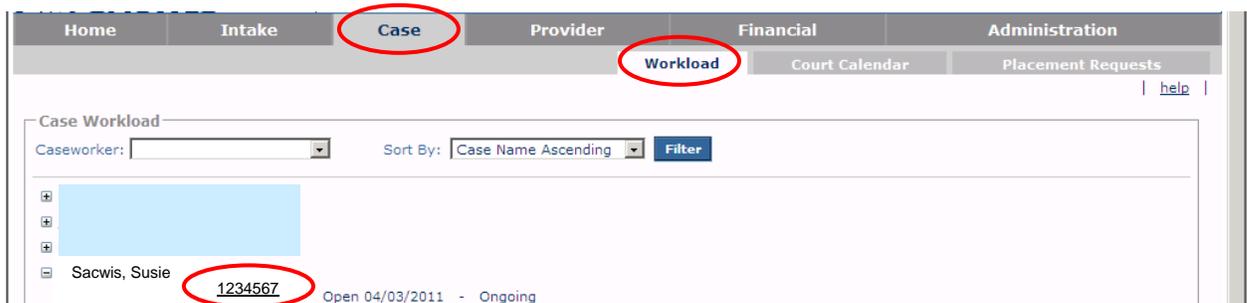
Once saved, a participant's signature detail information is "frozen" and cannot be changed. However, other (new) participant's signature detail information can be added.

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

Navigating to the Screen

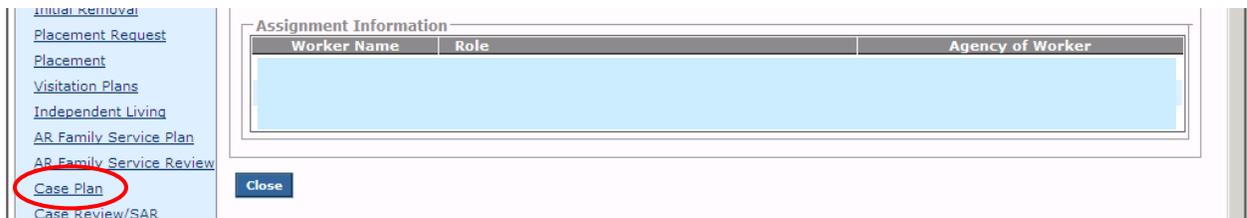
1. From the SACWIS **Home** screen, click the **Case** tab.
2. Click the **Workload** tab.
3. Select the appropriate **Case ID** link.

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.

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



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

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- To view the signature detail information, click the **View** link in the appropriate row.
- To edit, click the **Edit** link in the appropriate row.

The screenshot shows a web application interface with a navigation menu on the left and a main content area. The main content area is titled "Case Plan Filter Criteria" and "Case Plans".

Case Plan Filter Criteria:

- Case ID: [Redacted]
- Case Name: [Redacted]
- Case Status: Open (05/09/2011)
- Case Category: Ongoing
- From Approved Date: [Date Picker]
- To Approved Date: [Date Picker]
- Status: [Dropdown]
- Agency: [Dropdown]
- Sort Results By: Approved Date (Descending)
- Recommended Case Plans with a Court Status of Declined or Not Applicable: Exclude Include

Case Plans:

Type	Plan	Status	Approved Date	File Date	Agency
edit	Amended	1.03	In progress		
copy reports					delete
view	Amended	1.02	Approved	07/19/2011	
copy reports					history

Buttons: [Filter](#), [Clear Form](#), [Add Case Plan](#)

The **Case Plan Topics** screen appears.

- Click the **Court/Signature Details** link.

The screenshot shows the "Case Plan Topics" screen. At the top, it displays "Case Plan Type: Amended", "Plan Number: 1.03", and "Status: In progress". Below this is a table with two columns: "Topic" and "Status".

Topic	Status
Identifying Information	Provided
Strengths and Concerns	5 Strength(s) / 4 Concern(s) Records Entered
Placement Information	Provided
Placement Visitation	1 Visitation Plan(s) Linked
Caregiver Services	2 Service(s) Linked
Independent Living Information	Provided
Amendment Information	Provided
Court/Signature Details	0 Signature(s) Provided
Family Participation	Provided

Buttons: [Validate for Approval](#), [Process for Approval](#), [Close](#)

The **Court/Signature Details** screen appears.

Adding Case Plan Signature Details

Adding Court Details Information

1. In the **Court Details** section, complete the fields as needed.

Important:

- If signature details are being added to an **Approved** case plan, the **Court Status** field is required to save the record.
- Current SACWIS functionality allows a record to be saved without selecting any signature participant(s) or completing the signature detail fields. If no participants are selected, the signature page will then print out on the **Case Plan Report** showing all of the case plan participants, as well as the assigned workers and supervisors.

Court/Signature Details

Court Details

Court File Date:

Court Status: *

Court Status Date:

Signature Details

Participant/DOB	Signature Captured	Captured Date	Reason	Agreed with Plan	Participated in Plan	Relationship to Children
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Adding Case Member Signature Details

In the **Signature Details** section:

1. To select a participant, click the check box in that person's row.
2. Complete the signature detail fields for that participant (shown in red).
3. Repeat the previous two steps to select additional participants.

Signature Details

Participant/DOB	Signature Captured	Captured Date	Reason	Agreed with Plan	Participated in Plan	Relationship to Children
<input checked="" type="checkbox"/> Role: Plan Participant	Yes	11/15/2011		Yes	Yes	Adoptive Daughter
<input type="checkbox"/> Role: Plan Participant						

Adding Case Plan Signature Details

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 grays out 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.
- As shown in green below, if the selected participant is a worker or supervisor, the **Date Copy of Plan Provided** field is not available. However, a date field appears for the other participants.

Participant/DOB	Signature Captured	Captured Date	Reason	Agreed with Plan	Participated in Plan	Relationship to Children	Date Copy Of Plan Provided
<input type="text"/>	<input type="text"/>						
<input type="text"/>	<input type="text"/>						
<input type="text"/>	<input type="text"/>						
<input type="text"/>	<input type="text"/>						
<input type="text"/>	<input type="text"/>						
<input type="text"/>	<input type="text"/>						

Adding Non-Case Member Signature Details

1. If a non-case member’s signature needs to be captured, click the **Add Non-Case Member Signature** button at the bottom of the screen.

<input type="checkbox"/>	<input type="text"/>						
<input type="checkbox"/>	<input type="text"/>						

Add Non Case Member Signature

The **Person Search Criteria** screen appears.

Adding Case Plan Signature Details

2. Enter the filter criteria.
3. Click the **Search** button.
4. If the person exists in SACWIS, click the **Select** link for their record.
5. If not, click the **Create New Person** button.
6. Enter the person's information.
7. Save the record.
8. Then click the **Select** link for that person's record.

Person Search Criteria

Prefix:

Last Name: AKA Sounds Like
[HINT: AKA / 'Sounds Like' applies to last/first/middle name only. Wildcard (%) search & 'Sounds Like' cannot be used together.]

First Name:

Suffix:

Middle Name:

DOB: or From Age: To Age:

Gender: Race: Hispanic/Latino:

Person ID:

Advanced Search Criteria

Sort Results By:

Search **Clear Form** **Return**

Person Search Results

Result(s) 1 - 1 of 1 Page 1 of 1

	Person ID	Name	Street	City	State/Zip	Gender	Age	DOB
select								

Return **Create New Person**

The **Court/Signature Details** screen appears displaying that person's name at the bottom of the grid. The person's name appears already check marked.

	Participant/DOB	Signature Captured	Captured Date	Reason	Agreed with Plan	Participated in Plan	Relationship to Children
<input checked="" type="checkbox"/>	Role:Plan Participant	Yes	11/15/2011				
<input checked="" type="checkbox"/>	Role:Plan Participant	Yes	11/15/2011				
<input type="checkbox"/>	Role:Plan Participant						
<input checked="" type="checkbox"/>	Role:Other						

Add Non Case Member Signature

Adding Case Plan Signature Details

9. Complete the signature detail fields for that participant in the appropriate row.
10. If the participant(s) did not participate or disagreed with the case plan, state the reason why in the narrative field.
11. Click **Save** button.

The screenshot shows a web form for adding case plan signature details. It features a table with the following columns: Role, Yes, No, Date, and Narrative. The 'Role:Other' row is highlighted with a red box. Below the table is a 'Narrative' field with a red border and a 'Save' button circled in red.

<input type="checkbox"/>	Role:Supervisor					
<input type="checkbox"/>	Role:Supervisor					
<input checked="" type="checkbox"/>	Role:Other	Yes	No	11/15/2011		Aunt

Add Non Case Member Signature

If the participant(s) did not participate or disagreed with the case plan, state the reason why:

Spell Check Clear 1000

Apply **Save** Cancel

Important: Once the signature detail information is saved, that participant's detail field is "frozen" and cannot be changed. However, new participant's signature detail information can be added.