Case Planning Workflow

The Agency has a Case for which They Have Decided to Provide Case Management Services

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The Case Plan Worker Chooses to Record Case Plan Information

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Is this the Initial Case Plan for this Case Episode? — No → **Is there a Court Order for Another Case Plan or Is this a Proposed Case Plan?**

Is this the Initial Case Plan for this Case Episode? — Yes ↓

The Worker Adds a New Case Plan

→ The System Populates the Available Case Plan Participants from the Participants Chosen in the Family Assessment

If the Intake is a Safe Haven, Abandoned, or Permanent Surrender, the Worker Chooses the Participants because there is no Family Assessment

Is there a Court Order for Another Case Plan or Is this a Proposed Case Plan? — No → **Does the Worker Wish to Amend an Approved Case Plan?**

Is there a Court Order for Another Case Plan or Is this a Proposed Case Plan? — Yes →

Does the Worker Wish to Amend an Approved Case Plan? — No → **Does the Worker Want to Edit an Unapproved Case Plan?**

Does the Worker Wish to Amend an Approved Case Plan? — Yes ↓

Does the Worker Want to Edit an Unapproved Case Plan? — No → **No Changes are Made to a Case Plan**

No Changes are Made to a Case Plan — No → (top)

Does the Worker Want to Edit an Unapproved Case Plan? — Yes ↓

The Worker Chooses Children & Adults for Case Plans from the Available Case Participant List

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Worker Records the Child's Permanency Goal in the Plan

→ **Is the Child in the Custody of the Agency?**

Is the Child in the Custody of the Agency? — No →

Case Plan Topics Required for all Case Plans

Worker Records Independent Living Information Including Life Skills & Services Required for Independent Living as Appropriate

Worker Records the Strengths and Concerns Information for the Case Participants → Worker Links Services to Each Concern Record (See Services Flow)

Is the Child in the Custody of the Agency? — Yes ↓

Case Plan Topics Required for Cases Where the Agency Has Custody

Worker Records the Placement Setting Information for the Child

The Worker Records Which Services Will Be Provided to the Caregiver → The Worker Links Services Associated with the Child to the Caregiver

Worker Completes the Exceptions Information for the Child if Applicable

Worker Records the Visitation Plan Details for the Child → The Worker Links at Least One Visitation Plan (Non-Expired) to the Visitation Details Topic (See Visitation Plan Flow)

Compelling Reasons Why TPR is not in the Best Interests of the Child and/ or Why the Agency Has Not Provided Services to Case Participants That Will Ensure the Childs Return Home

→ **Is the Agency's Custody Permanent?**

Is the Agency's Custody Permanent? — Yes →

Permanency Information Topic Required When Agency Has Permanent Custody

Worker Records Steps Taken by the Agency to Find a Permanent Placement → Worker Records Recruitment Activities that the Agency has Undertaken on Behalf of the Child

Worker Submits Case Plan for Approval & Supervisor Approves

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The Approved Case Plan is in Effect for the Case