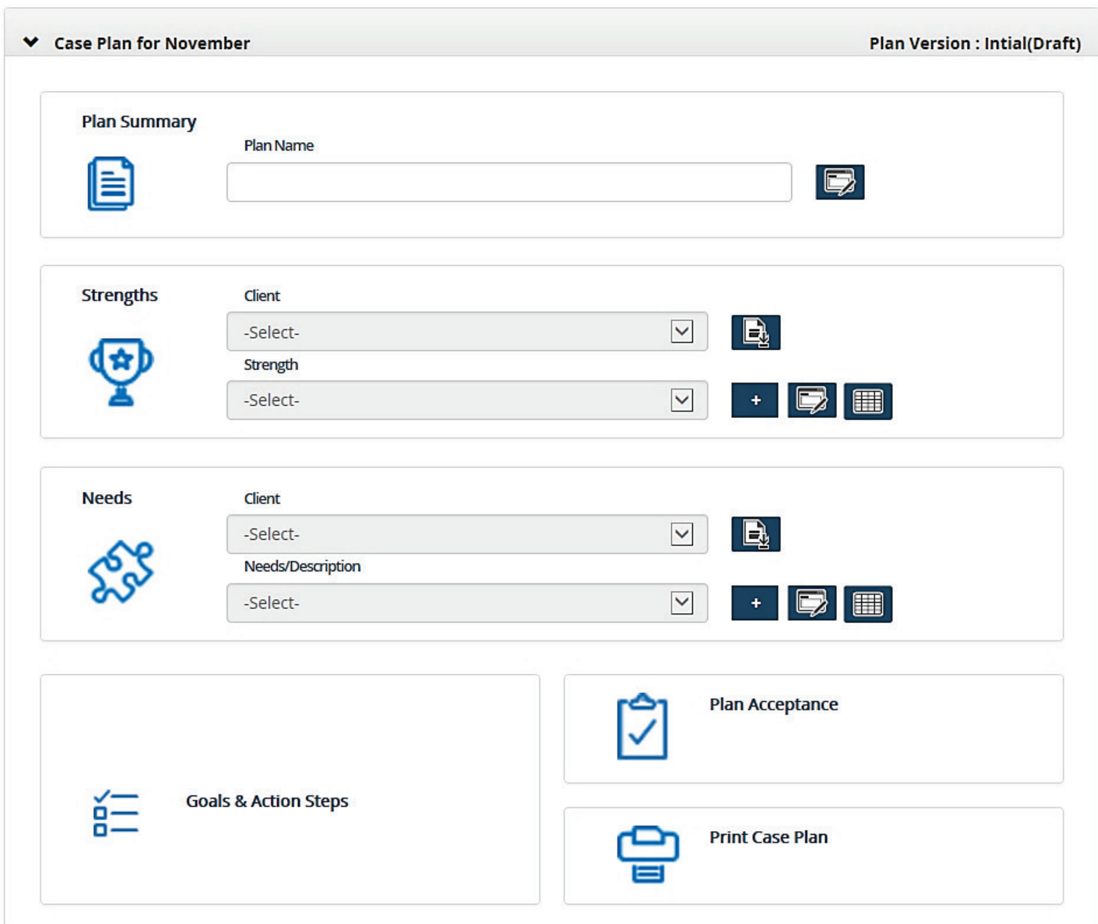
Case Plan – FSC Job Aid

The *Plans* screen allows users to document and update Case Plans for the family.

Case Plan

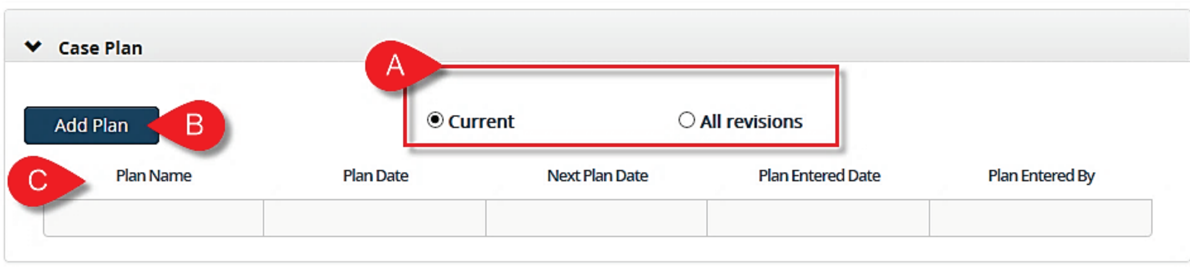


Navigation

1. From the Dashboard:
    a. Locate the desired Case and click on the Case ID to bring the Case into focus. The *Summary* screen will open.
    b. Click on the *View Case Plan* Navigation Tile in the Next Steps pane.
2. From within the Case:
    a. Click on the Tracking tile. Then click on the Plans tile.

Case Plan list screen

1. The Case Plan pane contains a list of the current and prior Plans.



   a. The list will default to the most *Current* Case Plan. To view both the most recent and all previous Case Plans (Revisions) select the ◉ *All Revisions* radio button.

   b. To add a new Plan, click Add Plan.

   c. The *Case Plan* grid contains basic information about the documented Plans including the *Plan Name, Plan Date* – the date on which the Plan is scheduled to occur, *Next Plan Date* – the date that the user entered the Plan into Synergy, and *Plan Entered By* which indicates which user created the Plan.

Case Plan Overview

1. Buttons and drop-downs in the *Plan* screen:
   a. Edit : Clicking on this button allows the user to edit information in that section.

   b. Import : Clicking on this button allows the user to import Strengths or Needs from the latest Assessment into the Plan.

   c. Add +: Clicking on this button allows the user to add a Strength or a Need manually to the Plan.

   d. View : Clicking on this button allows the user to view a list of the Strengths or Needs that have already been added to the Plan.

   e. Deactivated individuals: If an individual has been deactivated on the Case they may still appear in some drop-downs in grey text with double asterisks. Example: ****Jane Doe****
   Remember that individuals can be Activated again on the *Household* screen.
   If an individual's name appears in a drop-down as greyed out that individual cannot be selected in that drop-down.

Requirements by Section

- ***Plan Summary*:**

  This section must be edited and saved before the user can move on to the next screen. A green checkmark **[✓]** will appear on this tile when this section's requirements are met. (See **Page 4** of this Job Aid for detailed instructions.)

- ***Strengths*:**

  At least one Strength must be documented on the Plan.
  A green checkmark **[✓]** will appear on this tile when at least one Strength has been documented. (See **Page 5** of this Job Aid for detailed instructions.)

- ***Needs*:**

  At least one Need must be documented on the Plan.
  A green checkmark **[✓]** will appear on this tile when at least one Need has been documented. (See **Page 8** of this Job Aid for detailed instructions.)

- ***Goals & Action Steps*:**

  There must be at least one Outcome/Goal and one Action Step documented on the Plan. Each Outcome/Goal must have at least one Need associated with it.
  (See **Page 12** of this Job Aid for detailed instructions.)

- ***Plan Acceptance*:**

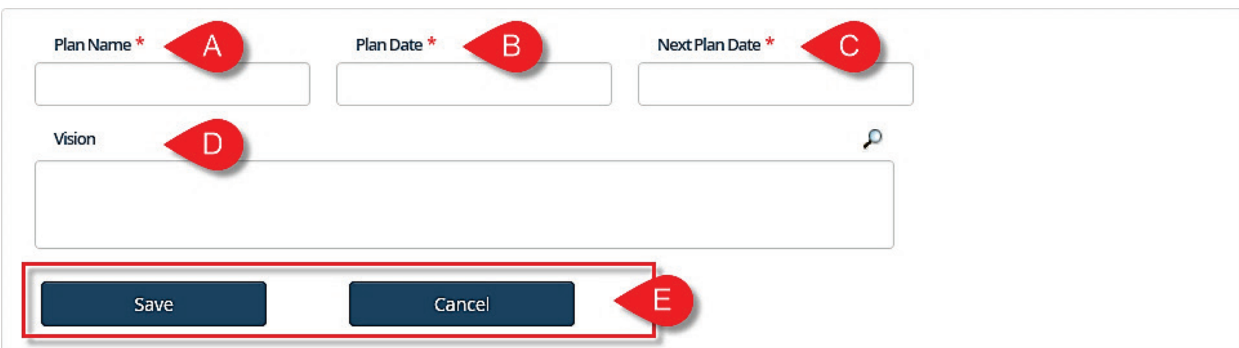
  In order to Finalize or Request Approval for a Plan the requirements for *Plan Summary, Strengths, Needs,* and *Goals & Action Steps* must be met. If any requirements have been missed that information will appear in red text when the user attempts to Finalize or Request Approval.
  (See **Page 16** of this Job Aid for detailed instructions.)

Plan Summary

1. *Plan Summary*: This section must be edited and saved before the user can move on to the next screen.

   a. Click the Edit button to open up the *Plan Summary* pop-up.

2. Plan Summary pop-up:



   a. *Plan Name*: Enter a name for the Plan here. The *Plan Name* is displayed in the *Case Plan* list screen grid and can allow the user to quickly identify which Plan to select for viewing or editing.

   b. *Plan Date*: Enter the date that the Plan is to occur.

   c. *Next Plan Date*: Synergy automatically calculates a date that is one year after the Plan Date. The Next Plan Date can be edited if necessary.

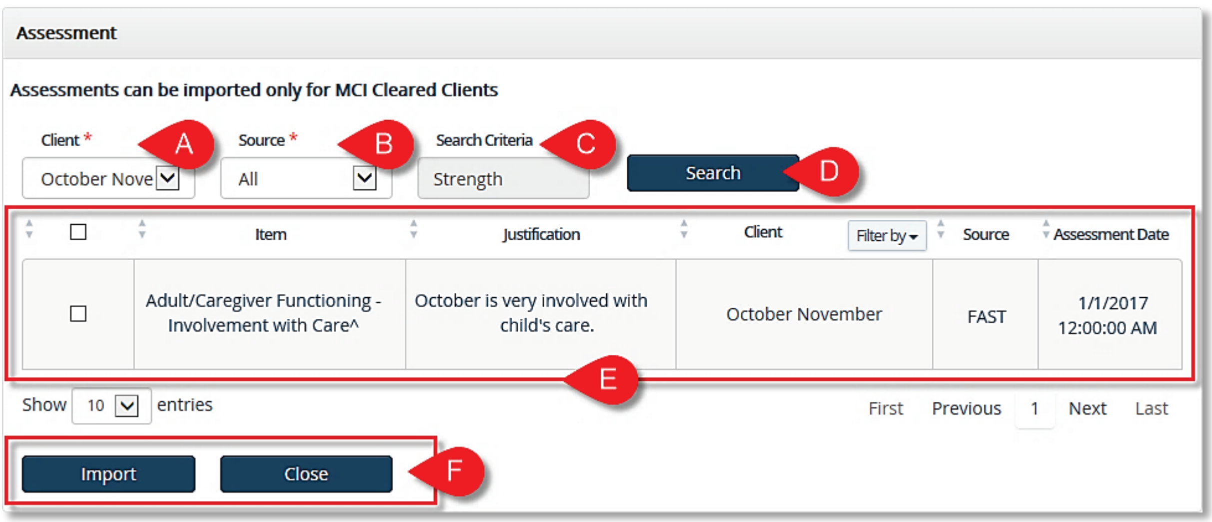
   d. *Vision*: If applicable, document the Plan Vision in this textbox.

   e. Click **Save** to save the information entered or edited and close the pop-up. Clicking **Cancel** will close the pop-up without saving any of the information entered or edited.

Strengths

1. *Strengths*: At least one Strength must be documented on the Plan.

2. Importing Strengths: Select the Participant from the *Client* drop-down and Click the Import button to open the *Assessment* pop-up:



a. *Client*: This drop-down defaults to the individual selected in the *Strengths – Client* drop-down but another individual or "All" can be selected from the drop-down instead.

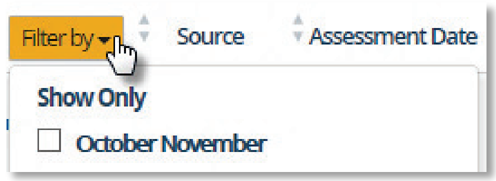
b. *Source*: This drop-down defaults to "All" but a specific Assessment type can be selected from the drop-down instead.

c. *Search Criteria*: This field defaults to Strengths and is not editable.

d. Click **Search** to search for documented Strengths using the criteria selected.

e. The *Search Results* grid will include Strengths from Assessments that have been completed within the last 8 months.

   i. If "All" was selected in the *Client* drop-down the *Search Results* can be filtered to a specific individual or individuals using the *Filter By* MultiSelect drop-down.

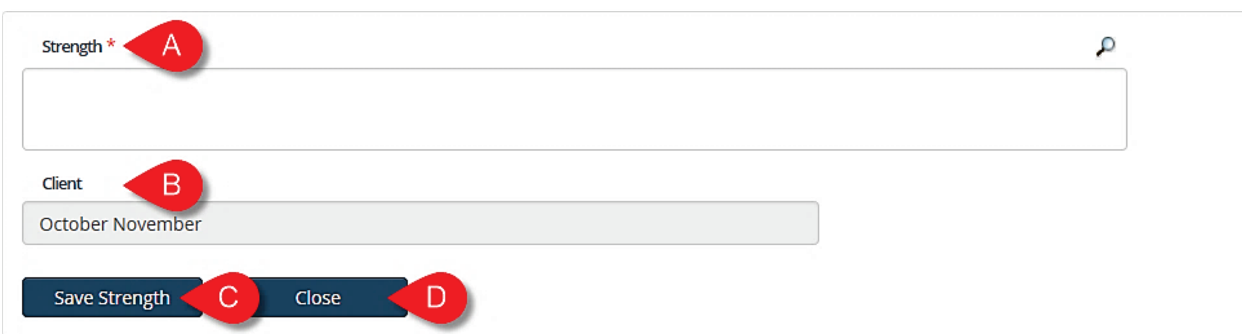


   ii. To select a Strength for import, check the checkbox to the left of the *Item* in the *Search Results* grid.

   iii. To select all of the Strengths for import, check the checkbox above the first column in the *Search Results* grid.

f. Click **Import** to import the selected Strengths into the Plan.
   Clicking **Close** will close the *Assessment* pop-up without importing any Strengths.

3. Adding a new Strength: In the *Strengths - Clients* drop-down select an individual to document a Strength for. Then click the Add button **+** to open a new *Strength* pop-up:



   a. *Strength*: Document the Strength in this textbox.

   b. *Client*: The individual selected in the *Strengths – Client* drop-down will automatically be entered here and cannot be changed.

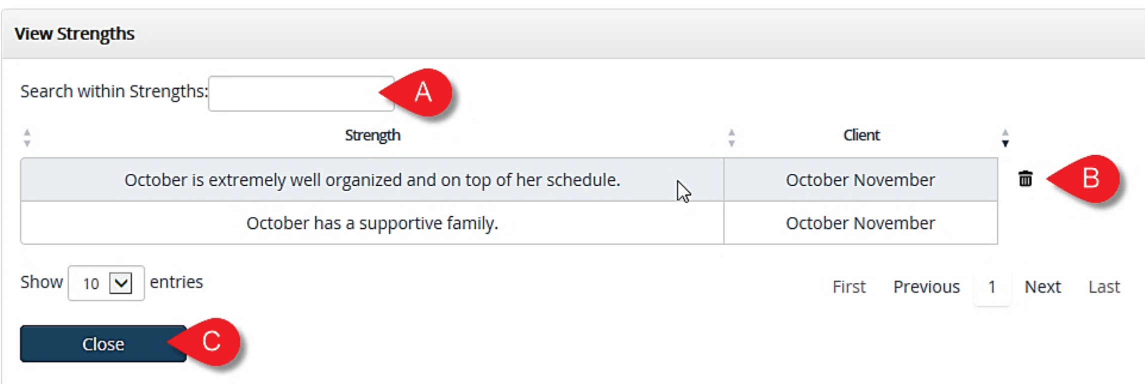
   c. Click **Save Strength** to save the Strength and close the pop-up.

   d. Clicking **Close** will close the pop-up without saving the information entered or edited.

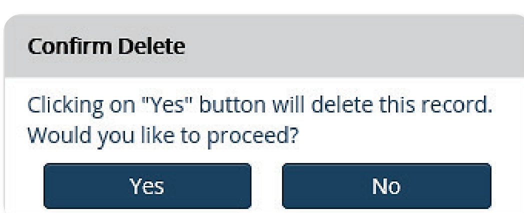
4. Editing a Strength:

a. In the *Strengths - Client* drop-down select the desired individual. That individual's documented Strengths will appear in the *Strength* drop-down options.
b. *Strength*: Select a Strength to edit from this drop-down.
c. Click the Edit button to open the *Strength* pop-up for editing.
Click **Save Strength** to save the Strength after it has been updated and close the pop-up.
Clicking **Close** will close the pop-up without saving the information entered or edited.

5. Viewing the Strengths list: Click the View button to open the *View Strengths* pop-up.



a. *Search within Strengths*: This field can be used to search for any word or phrase within the *Strengths* grid.
b. To delete a Strength, move the mouse over that Strength's line in the grid. A Delete Icon [🗑] will appear to the right of the Strength in the grid. Click the Delete Icon [🗑].
A *Confirm Delete* pop-up will appear: Clicking **Yes** will delete the Strength. Clicking **No** will cancel the action and the Strength will not be deleted.

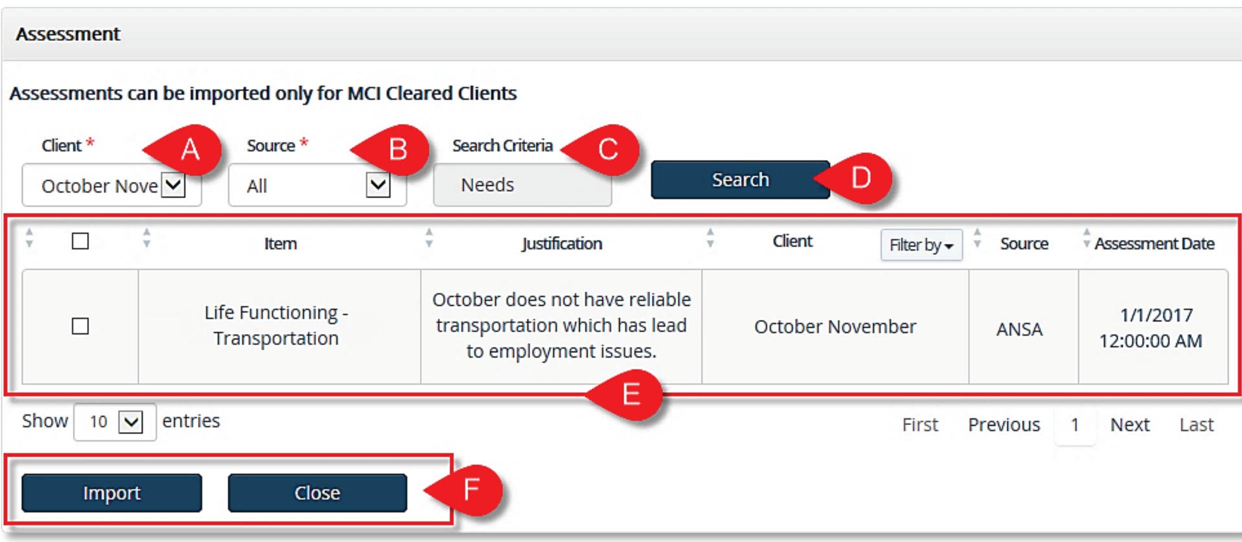


c. Clicking **Close** will close the *View Strengths* pop-up.

Needs

1. Needs: At least one Need must be documented on the Plan.

2. Importing Needs: Select an individual from the Client drop-down and click the Import button to open the *Assessment* pop-up:



a. *Client*: This drop-down defaults to the individual selected in the Needs – Client drop-down but another individual or "All" can be selected from the drop-down instead.

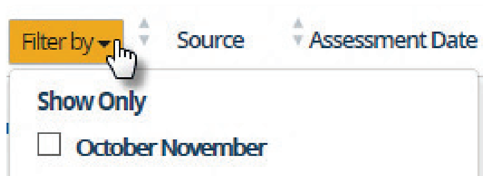
b. *Source*: This drop-down defaults to "All" but a specific Assessment type can be selected from the drop-down instead.

c. *Search Criteria*: This field defaults to Needs and is not editable.

d. Click **Search** to search for documented Needs using the criteria selected.

e. The *Search Results* grid will include Needs from Assessments that have been completed within the last 8 months.

   i. If "All" was selected in the *Client* drop-down the *Search Results* can be filtered to a specific individual or individuals using the *Filter By* MultiSelect drop-down.

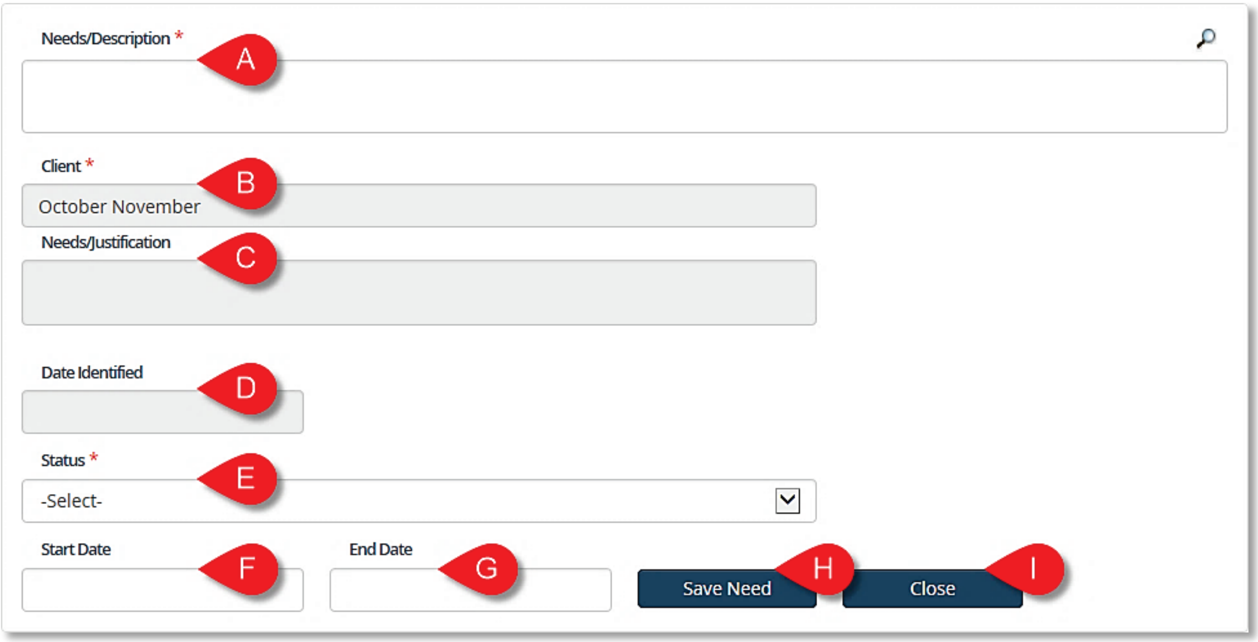


   ii. To select a Need for import, check the checkbox to the left of the Item in the *Search Results* grid.

   iii. To select all of the Needs for import, check the checkbox above the first column in the *Search Results* grid.

f. Click **Import** to import the selected Needs into the Plan.
   Clicking **Close** will close the *Assessment* pop-up without importing any Needs.

3. Adding a new Need: In the *Clients* drop-down select the individual whose Need is being documented. Then click the Add button + to open a new *Needs/Description* pop-up:



a. *Need/Description*: Document the Need in this textbox.

b. *Client*: The individual selected in the *Needs – Client* drop-down will automatically be entered here and cannot be changed.

c. *Needs/Justification*: The Justification on an imported need will appear here and will not be editable. This textbox will be blank on newly created Needs.

d. *Date Identified*: The date of the Assessment on an imported need will appear here and will not be editable. This field will be blank on newly created Needs.

e. *Status*: Select the Status of the Need from the drop-down.

f. *Start Date*: If applicable enter a Start Date for the Need.

g. *End Date*: If applicable enter an End Date for the Need.

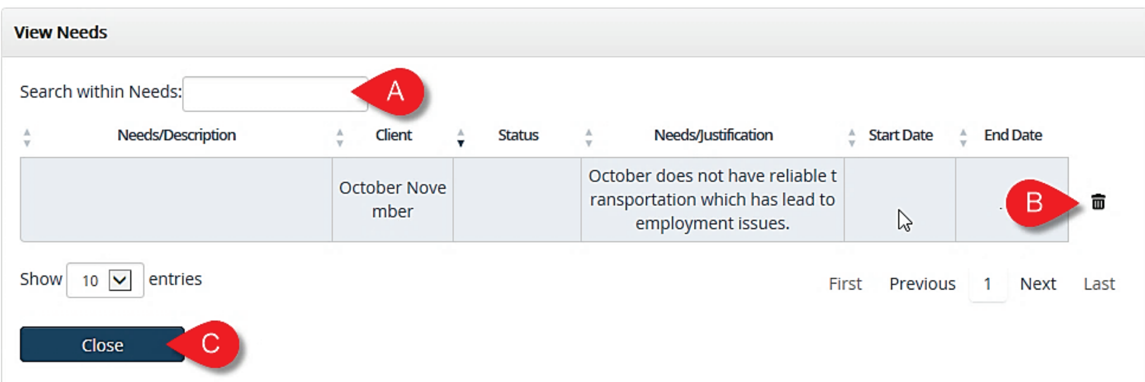
h. Click Save need to save the Need and close the pop-up.

i. Clicking Close will close the pop-up without saving the information entered or edited.

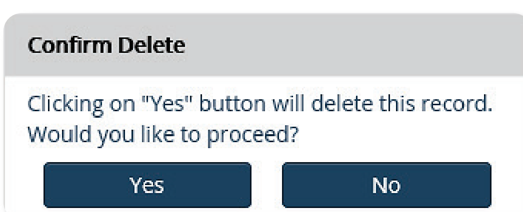
4. Editing a Need:

a. In the *Needs - Client* drop-down select the desired individual. That individual's documented Needs will appear in the *Needs* drop-down.
b. *Needs*: Select the Need to edit from this drop-down.
c. Click the Edit button to open the *Needs* pop-up for editing.
   Click **Save Need** to save the Need and close the pop-up.
   Clicking **Close** will close the pop-up without saving the information entered or edited.

5. Viewing the Needs list: Click the View button to open the *View Needs* pop-up.



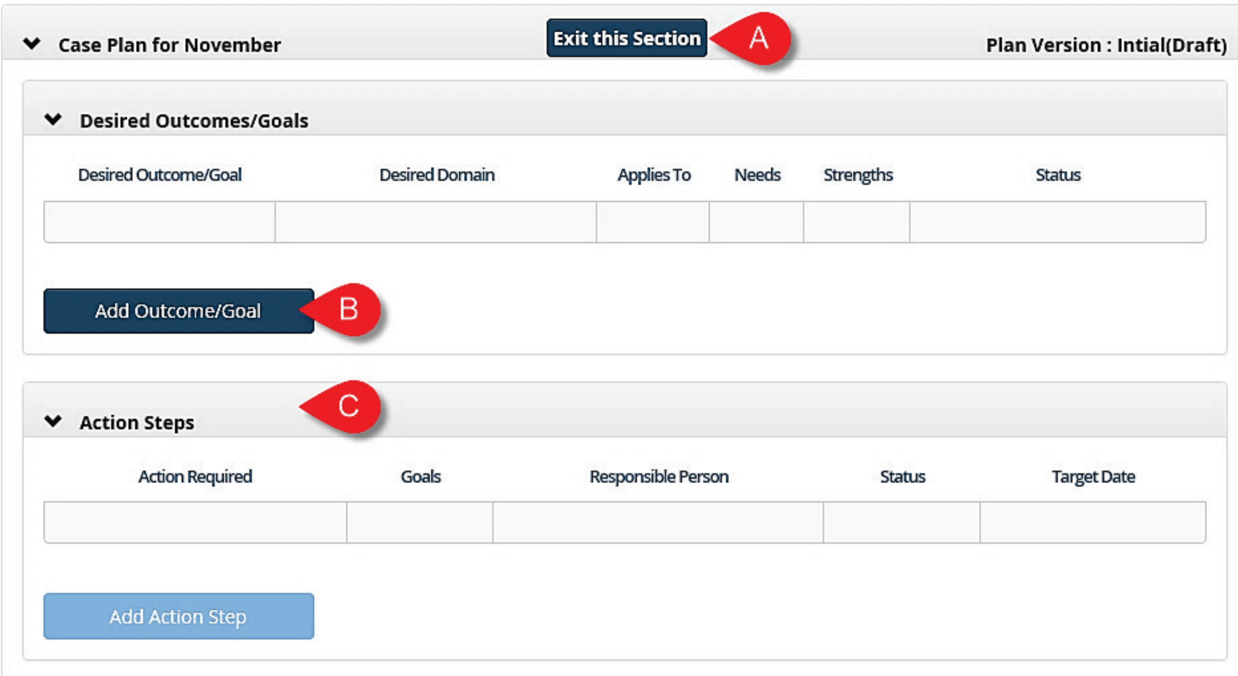
a. *Search within Needs*: This field can be used to search for any word or phrase within the *Needs* grid.
b. To delete a Need, move the mouse over that Need's line in the grid. A Delete Icon [🗑] will appear to the right of the Need in the grid. Click the Delete Icon [🗑]. A *Confirm Delete* pop-up will appear: Clicking **Yes** will delete the Need. Clicking **No** will cancel the action and the Need will not be deleted.



c. Clicking **Close** will close the *View Needs* pop-up.

Goals & Action Steps

1. Click on **Goals & Action Steps** to open the **Desired Outcomes/Goals** and **Action Steps** sub-panes.

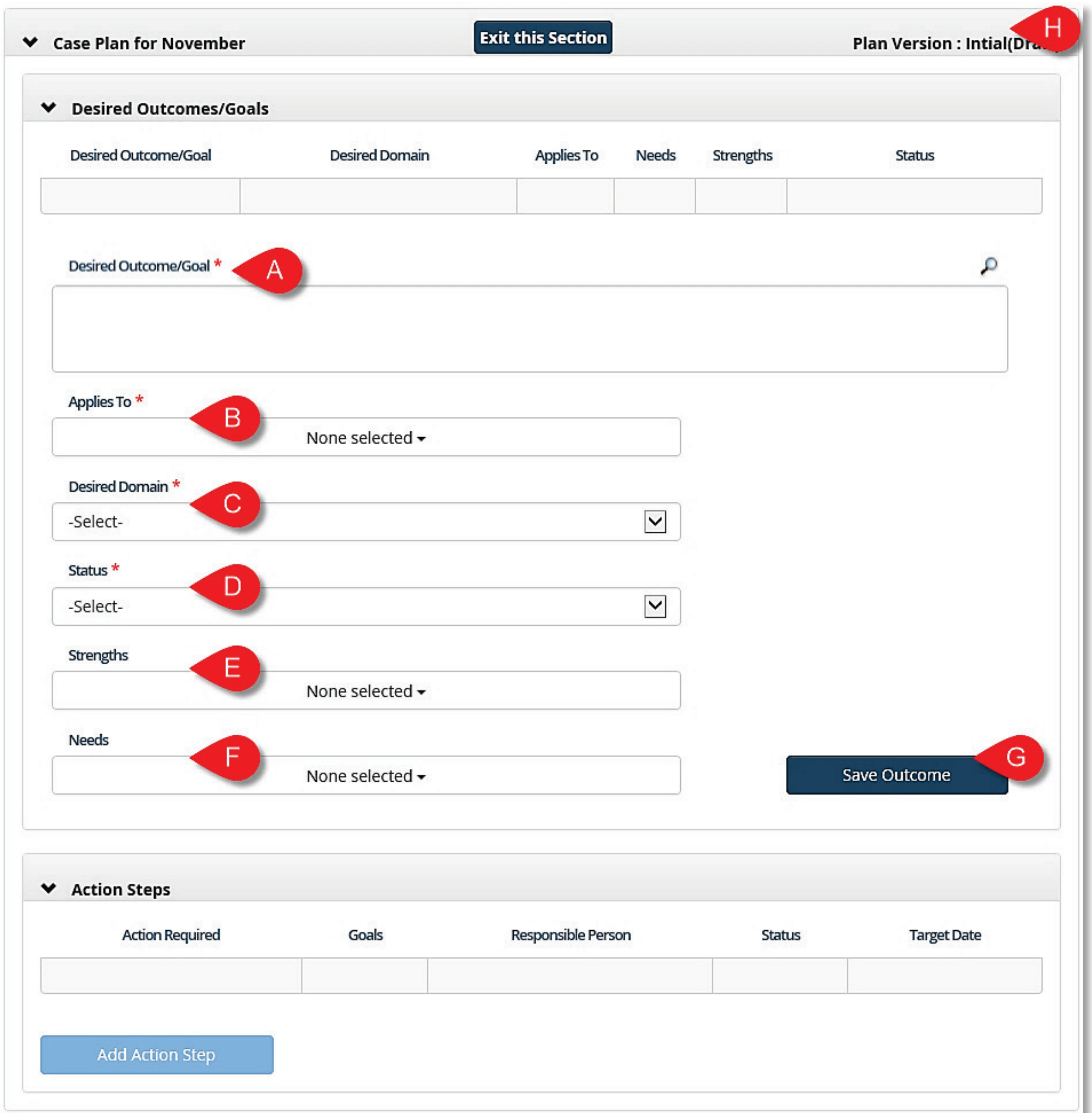


   a. Clicking **Exit this Section** will return the user to the *Plan* screen. Any unsaved information will be lost.

   b. Click **Add Outcome/Goal** to document a new Outcome/Goal.

   c. The **Action Steps** sub-pane is connected to the specific Outcome/Goal selected in the *Desired Outcomes/Goals* grid.

2. Adding an Outcome/Goal: Click **Add Outcome/Goal** to document a new Outcome/Goal:



a. *Desired Outcome/Goal*: Document the Desired Outcome/Goal in this textbox.

b. *Applies To*: Select the individual or individuals to whom this goal applies from the multi-select drop-down.
When more than one individual is selected, the Outcome/Goal will be saved separately in the *Desired Outcomes/Goals* grid with a copy for each individual that was selected.

Desired Outcome/Goal	Desired Domain	Applies To	Needs	Strengths	Status
Desired Outcome/Goal	Child Development	Sally Sunset		Susie Sunshine (Self) - Strength	In Progress
Desired Outcome/Goal	Child Development	Joe Smith		Susie Sunshine (Self) - Strength	In Progress

c. *Desired Domain*: Select the Domain that applies from the drop-down.

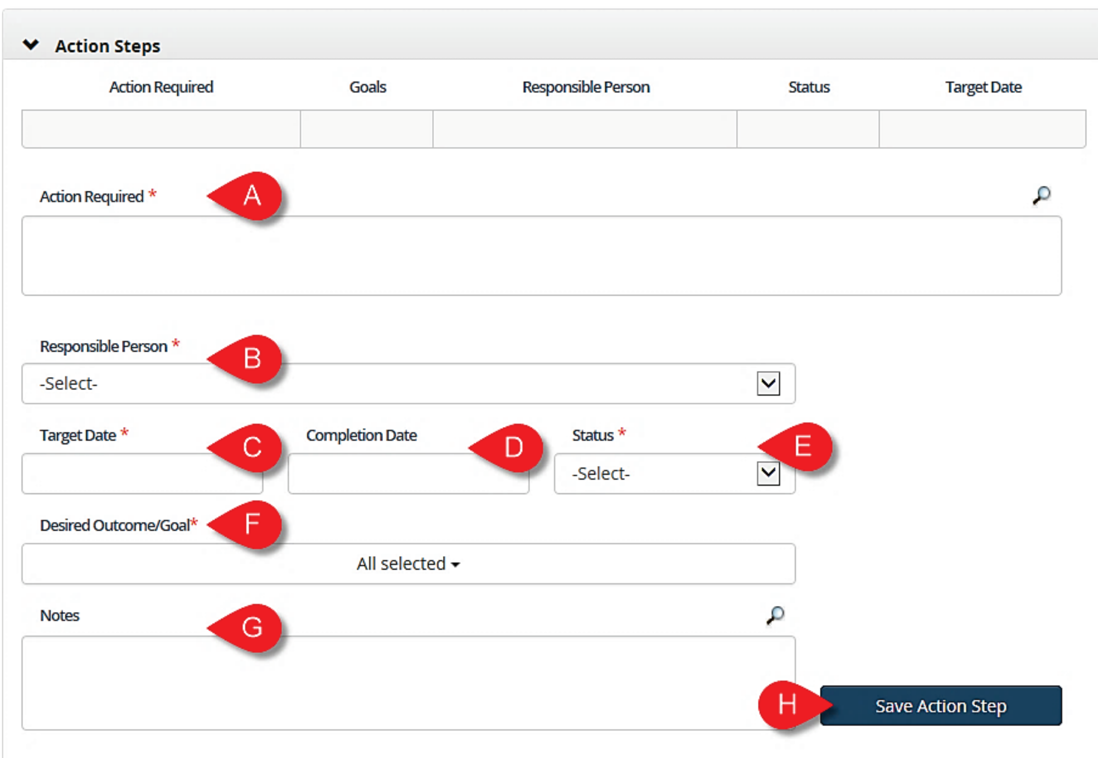
d. *Status*: Select the status of this Outcome/Goal from the drop-down.

e. *Strengths*: Select the Strength or Strengths that apply to this Outcome/Goal using the multi-select drop-down.

f. *Needs*: Select the Need or Needs that apply to this Outcome/Goal using the multi-select drop-down. Note: The Plan cannot be finalized unless each outcome/Goal has at least one Need selected.

g. Click **Save Outcome** to save the information entered.

3. Adding an Action Step: Click on an Outcome/Goal in the *Desired Outcome/Goal* grid to document Action Step(s) for that Outcome/Goal. Once the Outcome/Goal is selected click **Add Action Step** in the **Action Steps** sub-pane.



a. *Action Required*: Document the Action Step in this textbox.

b. *Responsible Person*: select the individual or individuals responsible for completing this Action Step from the multi-select drop-down.

c. *Target Date*: Enter a Target Date for completion of this Action Step.

d. *Completion Date*: If this Action Step has been completed, enter the date of completion.

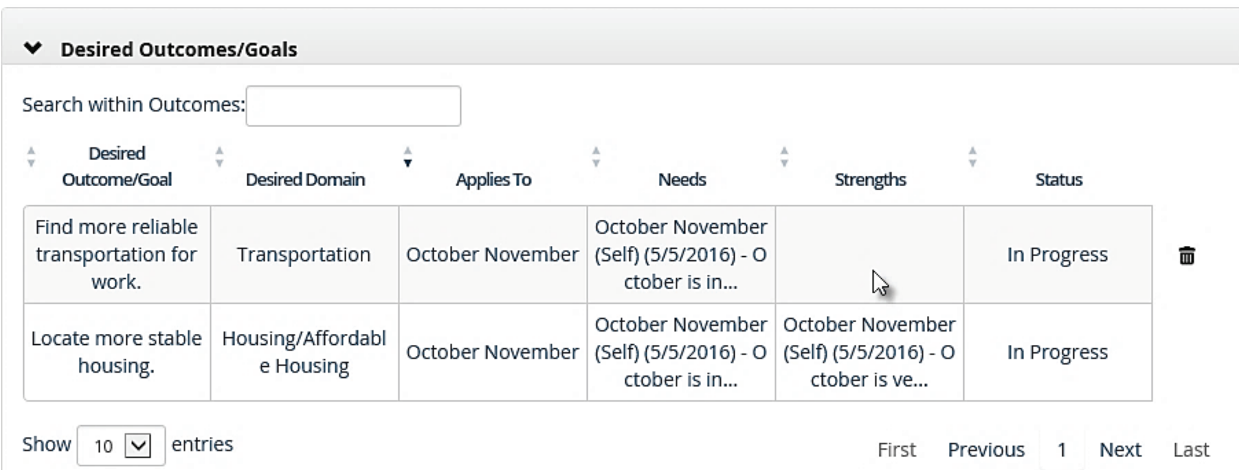
e. *Status*: Select the Status of this Action Step from the drop-down.

f. *Desired Outcome/Goal*: Select the Outcome or Outcomes to which this Action Step applies using the multi-select drop-down. If more than one Outcome/Goal is selected the Action step will be copied to each of the selected Outcome/Goal's Action Step lists.

g. *Notes*: If applicable, enter notes regarding this Action Step. The Notes will not be displayed on the printed version of the Plan.

h. Click **Save Action Step** to save the information entered.

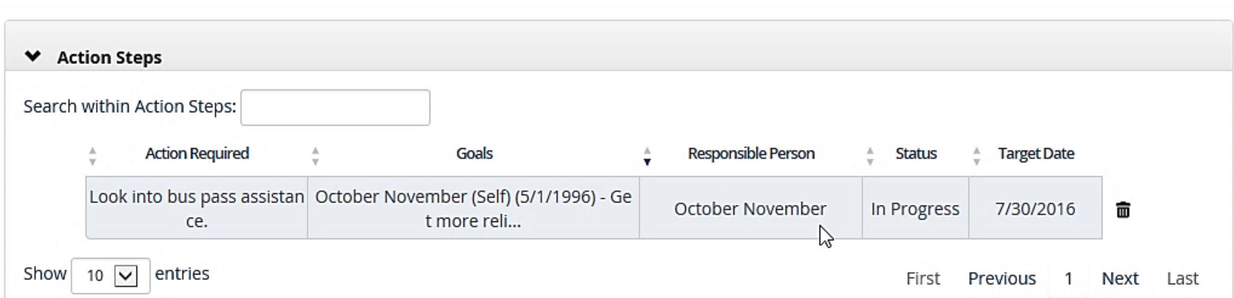
4. Searching within grids and deleting Outcomes/Goals or Action Steps:


Desired Outcomes/Goals

Search within Outcomes:

Desired Outcome/Goal	Desired Domain	Applies To	Needs	Strengths	Status
Find more reliable transportation for work.	Transportation	October November	October November (Self) (5/5/2016) - October is in...		In Progress
Locate more stable housing.	Housing/Affordable Housing	October November	October November (Self) (5/5/2016) - October is in...	October November (Self) (5/5/2016) - October is ve...	In Progress

Show 10 entries First Previous 1 Next Last


Action Steps

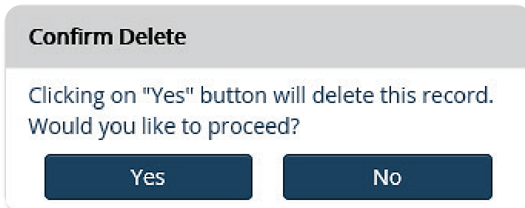
Search within Action Steps:

Action Required	Goals	Responsible Person	Status	Target Date
Look into bus pass assistance.	October November (Self) (5/1/1996) - Get more reli...	October November	In Progress	7/30/2016

Show 10 entries First Previous 1 Next Last

a. *Search within*: This field can be used to search for any word or phrase within the grid.

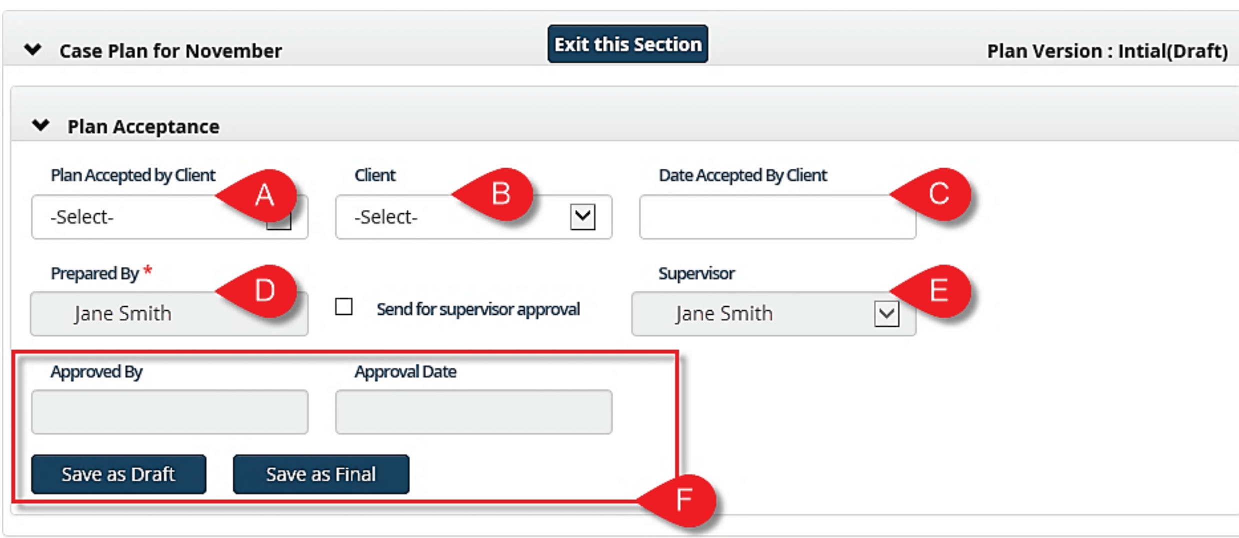
d. To delete an Outcome/Goal or Action Step, move the mouse over that that item's line in the grid. A Delete Icon [🗑] will appear to the right of the item in the grid. Click the Delete Icon [🗑]. A *Confirm Delete* pop-up will appear: Clicking **Yes** will delete the item. Clicking **No** will cancel the action and the item will not be deleted.



5. Click **Exit this Section** at the top of the **Case Plan** pane to return to the main *Plan* screen.

Plan Acceptance

1. Click **Plan Acceptance** on the *Plan* screen to open the **Plan Acceptance** pane.



a. *Plan Accepted by Client*: Indicate whether or not the client accepted the Plan by selecting "Yes" or "No" from the drop-down.

b. *Client*: Select the client who accepted the Plan (typically the Head of Household) from the drop-down.

c. *Date Accepted By Client*: If applicable, enter the date on which the Plan was accepted.

d. *Prepared By*: The name of the user who entered the Plan will be displayed here.

e. *Send for supervisor approval* and *Supervisor*: If supervisory approval is required by your program this will be displayed.
   i. Check the ☑ *Send for supervisor approval* checkbox to enable the Supervisor drop-down.

   ii. Select the Supervisor to whom the Plan will be sent. Click **Save as Final** to send the Plan for approval.

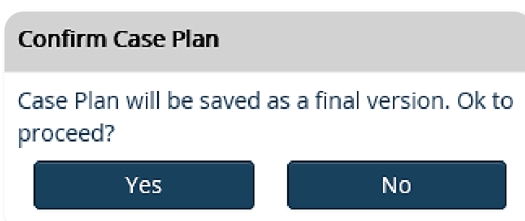
f. **Save as Draft** and **Save as Final**:
   i. Use **Save as Draft** to save the Plan without finalizing or sending for approval.

   ii. Use **Save as Final** to finalize the Plan and/or send the Plan for approval.

   iii. *Approved by*: If an approval is required this will display the name of the approving worker. If an approval is not required, this will display the name of the user who clicked **Save as Final**.

   iv. *Approval Date*: If an approval is required this will display the date of approval. If an approval is not required this will display the date that **Save as Final** was clicked.

2. Finalizing the Plan: When **Save as Final** is clicked the *Confirm Case Plan* pop-up will appear:



Clicking **Yes** will finalize the Plan.
Clicking **No** will close the pop-up without finalizing the Plan.

3. Approvals and Rejections: Once the Plan is submitted for approval, the Supervisor will be able to view the Plan in their **Unapproved Plans** pane on their Dashboard.
   a. Clicking on the Plan Name will navigate the Supervisor to the Plan. After reviewing the Plan, the Supervisor can either Approve or Reject the Plan in the **Plan Acceptance** screen.

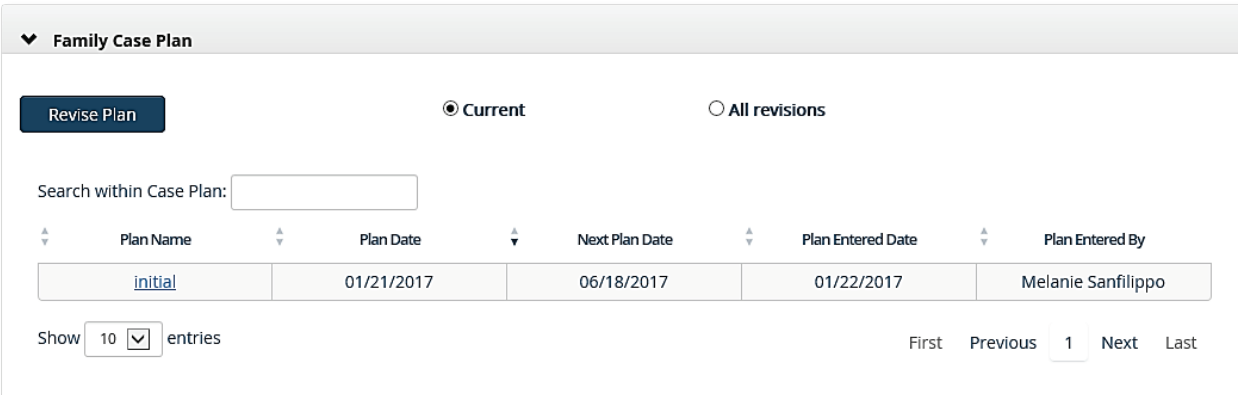
   b. If the Plan was rejected, the worker will be able to view the reason for rejection on the **Plan Acceptance** screen.

Revising the Plan

1. Once a Plan has been Finalized/Approved, revisions of the initial Plan can be made.

2. Navigate to **Tracking** and click on the **Plans** tile.

3. From the **Case Plans** pane:



   a. Select a Plan to revise from the *Case Plans* grid.

      i. Click the **Revise Plan** button above the *Case Plans* grid.

   b. The screen will refresh and the **Edit Plan** button will appear below the Case Plans grid.

      i. Click **Edit Plan** to open the *Plans* screen and create a new Revision of the Plan. Information from the previous Plan will carry over to the new Plan.

For more information…

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access iService, go to: https://servicedesk.alleghenycounty.us

This and other Job Aids can be found at: http://s3.amazonaws.com/dhs-application-support/index.htm