



TM DYS – CM – Manage Permanency Goal Job Aid

Users

- DYS Client Manager or DYS Client Manager Supervisor

Process

This Job Aid table describes the actions needed to manage the Permanency Goal from the Client Manager Detail page.

Related Job Aids

- *TM DYS_CM – Access/View Client Manager*

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Access and View Permanency Goal

- The default sort is by Target Date with the most recent on top.

Steps/Output

In the *Left Navigation Panel*:

- Click **Permanency Goal**.

This navigates to the *Permanency Goal* section.

Screenshot

The screenshot shows the 'Permanency Goal' section of the system. The left navigation panel has 'Permanency Goal' highlighted. The main content area displays a table with columns for 'Permanency Goal', 'Alternative Permanency Goal', 'Date Set', 'Target Date', 'Updated By', and 'Updated Date'. Below this are sections for '15 of 22' (with a 'Review Date' table), 'Removals' (with a table of start/end dates, removal manner, and span), 'Document Tracking', and 'Debts/Expense'.

Permanency Goal	Alternative Permanency Goal	Date Set	Target Date	Updated By	Updated Date
Return Home		6/11/2019	8/1/2020	Karen Chinatti	7/31/2019

Review Date
9/10/2020
9/10/2020
7/8/2019
12/8/2017

Start Date	End Date	Removal Manner	Span<24hr
6/11/2019		COURT	No
11/20/2017	11/19/2018	COURT	No

Document Type	Location of Document	Request Source	Date Requested
No information available			

Debt Type	Date	Court Case Number	Original Amount	Currently Owed
No information available				



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Add Permanency Goal

Steps/Output

In the *Permanency Goal* section:

1. Click the **Actions** drop-down arrow.
2. Select **Add Permanency Goal** from the drop-down list.

The *Add Permanency Goal* pop-up window displays.

Screenshot

The screenshot shows the 'Permanency Goal' section of the system. The 'Actions' dropdown menu is open, and 'Add Permanency Goal' is highlighted with a red box. The main content area displays a table with columns for 'Permanency Goal', 'Alternative Permanency Goal', 'Date Set', 'Target Date', and 'Updated By'. The table contains one row with the following data: 'Return Home', 'Karen Chinatti', '6/11/2019', '8/1/2020', and '7/31/2019'. Below the table, there are sections for '15 of 22', 'Removals', 'Document Tracking', and 'Debts/Expense', each with an 'Actions' dropdown menu.

In the *Add Permanency Goal* pop-up window:

3. Complete the required fields and enter as much information as is available.

Note:

- Date fields can be entered manually or by using the Calendar function.
- *Updated By* and *Date Updated* are read-only.

The screenshot shows the 'Add Permanency Goal' pop-up window. The 'Date Set*' and 'Target Date*' fields are highlighted with a red box. The window contains the following fields: 'Permanency Goal*' (dropdown), 'Alternative Permanency Goal*' (dropdown), 'Date Set*' (text/calendar), 'Target Date*' (text/calendar), 'Updated By' (text), and 'Date Updated' (text). The 'Updated By' field contains 'Cgi Qa Test5' and the 'Date Updated' field contains '03/10/2020'. There are 'Cancel' and 'Add' buttons at the bottom of the window.



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- Click **Add** to save the Permanency Goal or **Cancel** to close without saving.

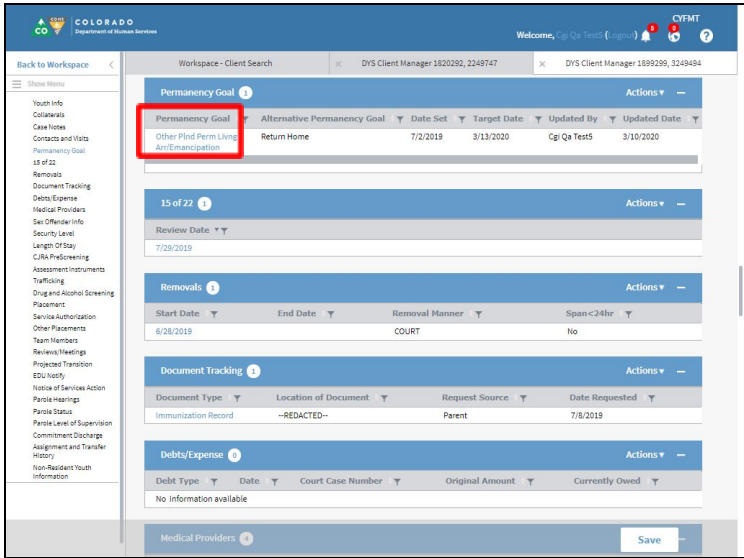
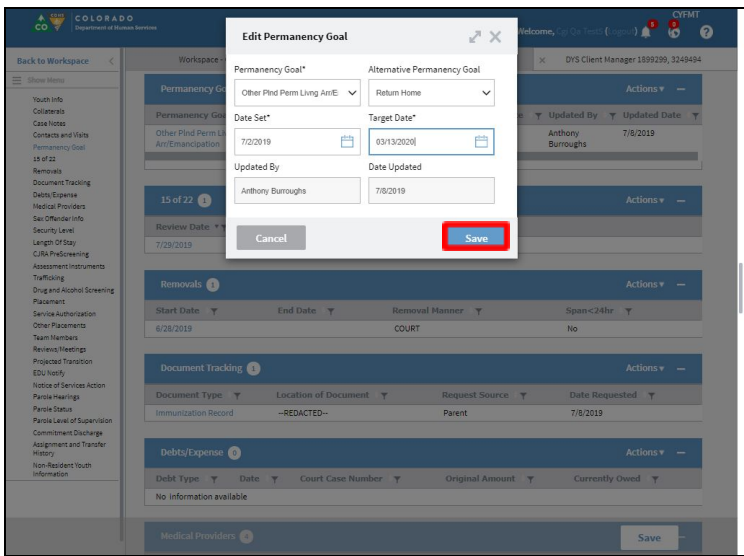
This saves the update and returns you to the *DYS Client Manager Detail Screen*.

Permanency Goal	Alternative Permanency Goal	Date Set	Target Date	Updated By	Updated Date
Remain Home	Perm Plnt w/Relative-Adopt	3/13/2020	4/6/2020	Cgi Qa Test5	3/10/2020



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Edit Permanency Goal

Steps/Output	Screenshot
<p>In the <i>Permanency Goal</i> section:</p> <ol style="list-style-type: none">1. Click the desired goal link in the Permanency Goal column. <p>This opens the <i>Edit Permanency Goal</i> pop-up window.</p>	 <p>The screenshot shows the 'Permanency Goal' section of the system. A table lists various goals, with 'Other Plnd Perm Living Arr/Emancipation' highlighted. Below the table are sections for '15 of 22', 'Removals', 'Document Tracking', and 'Debts/Expense'.</p>
<p>In the <i>Edit Permanency Goal</i> pop-up window:</p> <ol style="list-style-type: none">2. Update required fields and change additional information as needed.3. Click Save to save changes or Cancel to close without saving.	 <p>The screenshot shows the 'Edit Permanency Goal' pop-up window. It contains fields for 'Permanency Goal*', 'Alternative Permanency Goal', 'Date Set*', 'Target Date*', 'Updated By', and 'Date Updated'. The 'Save' button is highlighted with a red box.</p>



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This saves the changes and returns you to the *DYS Client Manager Detail Screen*.

The screenshot shows the 'Permanency Goal' section of the CDHS Client Manager interface. The table below contains the following data:

Permanency Goal	Alternative Permanency Goal	Date Set	Target Date	Updated Date	Updated Date
Other Find Perm Living and Responsibilities	Return Home	7/2/2019	9/13/2020	Cg Qa Tests	9/10/2020

Below the table, there are sections for '15 of 22' (Review Date: 7/29/2019), 'Removals' (Start Date: 6/28/2019, End Date: [blank], Removal Manner: COURT, Span<24hr: No), 'Document Tracking' (Document Type: Immunization Record, Location of Document: --REDACTED--, Request Source: Parent, Date Requested: 7/8/2019), and 'Debts/Expense' (No information available).