



DYS CM: YDP – Manage Case Plan Job Aid

Users

- DYS Client Manager
- DYS Client Manager Supervisor

Process

These Job Aid tables describe the actions needed to access and manage the Case Plan section of the Youth Development Plan from the Client Manager page.

Related Job Aids:

- *DYS_CM – Access and View Client Manager*
- *DYS_CM – Manage Youth Development Plan*
- *DYS_Assess – Manage Assessment Instruments*

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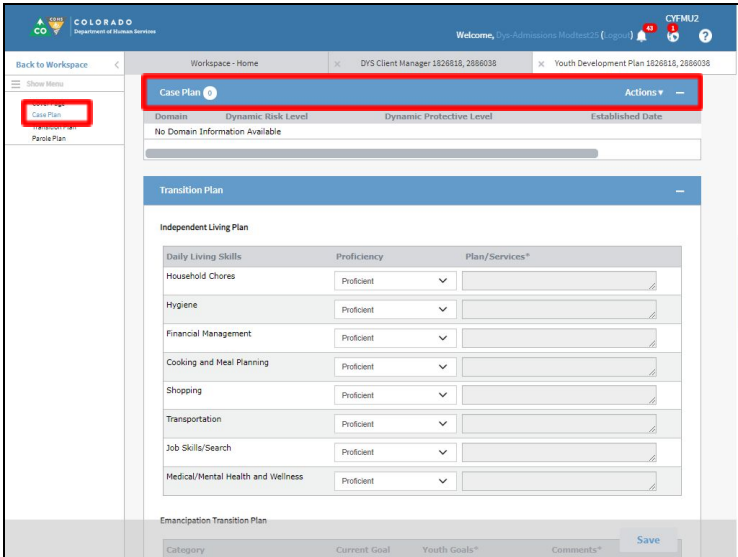
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Access and View Case Plan

- The Case Plan becomes read-only when the Youth is discharged.

Steps/Output	Screenshot
<p>Refer to the <i>DYS Client Manager – Access and View Client Manager Detail</i> and <i>DYS – CM – Manage Youth Development Plan Job Aids</i> for details on locating the desired Client Manager Detail page and YDP.</p> <p>In the Youth Development Plan’s <i>Left Navigation Panel</i>:</p> <ol style="list-style-type: none"> Click Case Plan. <p>The <i>Case Plan</i> section displays.</p>	 <p>The screenshot shows the DYS Client Manager interface. The 'Case Plan' option in the left navigation panel is highlighted with a red box. The main content area displays the 'Case Plan' details for a specific client, including a table for 'Independent Living Plan' with columns for 'Daily Living Skills', 'Proficiency', and 'Plan/Services*'. The proficiency level for all listed skills is 'Proficient'.</p>



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Add Case Plan

- A Case Plan cannot be added until a CJRA assessment is completed.
- For further information on managing assessments please review Job Aid *DYS – Manage Assessment Instruments*.
- All Full CJRA assessment domains are listed along with the additional domains of:
 - Sex Offense Specific Treatment Services
 - Restorative Justice
 - Parent Goals
 - Division Goals
 - Provider Goals
- Each time the Case Plan is accessed, Trails rechecks the most recent Full CJRA Assessment information and updates the Dynamic Risk Level and Dynamic Protective Level for the Youth as necessary.

Steps/Output	Screenshot
<p>In the <i>Case Plan</i> section:</p> <ol style="list-style-type: none"> 1. Click the Actions dropdown. 2. Select Add/Edit Domains. <p>The <i>YDP – Case Plan</i> page displays.</p>	<p>The screenshot shows the 'Case Plan' section of the application. At the top, there is a table with columns: Domain, Dynamic Risk Level, Dynamic Protective Level, and Established Date. Below this table, there is a section for 'Transition Plan' with a sub-section for 'Independent Living Plan'. This section contains a table with columns for 'Daily Living Skills', 'Proficiency', and 'Plan/Services*'. The 'Proficiency' column has dropdown menus set to 'Proficient'. The 'Plan/Services*' column has input fields. At the bottom of the page, there are fields for 'Category', 'Current Goal', 'Youth Goals*', 'Comments*', and a 'Save' button.</p>



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In the *Domains* section:

- Click the checkboxes of interest and/or special focus for the Youth.

The Domains section is multi-select, so more than one option can be selected.

Note: Assessment Type is set to *Full CJRA* and is not editable.

Domain	Dynamic Risk Level	Dynamic Protective Level	Established Date*	Target Date*
<input type="checkbox"/> Criminal History			MMDDYYYY	MMDDYYYY
<input type="checkbox"/> Demographics			MMDDYYYY	MMDDYYYY
<input type="checkbox"/> Education	High	Low	MMDDYYYY	MMDDYYYY
<input checked="" type="checkbox"/> Use of Free Time	Low	Moderate	MMDDYYYY	MMDDYYYY
* The youth will work in treatment to identify structured and unstructured activities that will assist the youth in developing the appropriate use of free time.				
Additional Information				
<input checked="" type="checkbox"/> Employment	Low	Low	MMDDYYYY	MMDDYYYY
Additional Information				
<input checked="" type="checkbox"/> Relationships	Low	Low	MMDDYYYY	MMDDYYYY

Note: For CJRA specific domains, the **Dynamic Risk Level** and **Dynamic Protective Level** are set and mirror the information from the Youth's Full CJRA Assessment.

Domain	Dynamic Risk Level	Dynamic Protective Level	Established Date*	Target Date*
<input type="checkbox"/> Criminal History			MMDDYYYY	MMDDYYYY
<input type="checkbox"/> Demographics			MMDDYYYY	MMDDYYYY
<input type="checkbox"/> Education	Moderate	Low	MMDDYYYY	MMDDYYYY
<input type="checkbox"/> Use of Free Time	Low	Low	MMDDYYYY	MMDDYYYY
<input type="checkbox"/> Employment	Low	Low	MMDDYYYY	MMDDYYYY
<input type="checkbox"/> Relationships	High	Low	MMDDYYYY	MMDDYYYY
<input type="checkbox"/> Family	Moderate	Moderate	MMDDYYYY	MMDDYYYY
<input type="checkbox"/> Alcohol and Drugs	Moderate	Low	MMDDYYYY	MMDDYYYY
<input type="checkbox"/> Mental Health	Low	Low	MMDDYYYY	MMDDYYYY
<input type="checkbox"/> Attitudes and Behaviors	Moderate	Low	MMDDYYYY	MMDDYYYY
<input type="checkbox"/> Aggression	Moderate	Low	MMDDYYYY	MMDDYYYY



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For the selected **Domains**:

4. Select the **Established Date*** using the calendar function.
5. Select the **Target Date*** using the calendar function.

Note: Depending on the Domain checked, a bulleted objective list displays (if applicable), and the **Additional Information** text field is added for further information to be entered.

The screenshot shows the 'YDP Case Plan' interface for client 1817191, 1784501. The 'Use of Free Time' domain is selected and highlighted with a red box. The interface includes a table of domains with columns for Domain, Dynamic Risk Level, Dynamic Protective Level, Established Date*, and Target Date*. The 'Use of Free Time' domain has a risk level of Low and a protective level of Moderate. Below the table, there is an 'Additional Information' text field and a bulleted objective list: 'The youth will work in treatment to identify structured and unstructured activities that will assist the youth in developing the appropriate use of free time.'

6. Enter **Additional Information** in the text field, as necessary.

Note: The **Established Date***, **Target Date*** and **Additional Information** fields remain the same each time the Case Plan is accessed until they are changed manually.

The screenshot shows the same 'YDP Case Plan' interface as above, but with the 'Additional Information' text field highlighted with a red box. The 'Use of Free Time' domain is still selected. The objective list and other domain information remain the same.



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7. Click **Save**.

The *Success* pop-up window displays.

The screenshot shows the 'Approval Request' form in the system. The form includes sections for 'Parent Goals', 'Division Goals', and 'Approval History'. The 'Approval History' table is currently empty. The 'Send to' dropdown is set to 'Maria Griffin'. The 'Requested by' field is 'Mod Test13' and the 'Requested Date' is '5/5/2020'. A 'Request Approval' button is visible at the bottom left. A red box highlights the 'Save' button at the bottom right of the form.

In the *Success* pop-up window:

8. Click **Ok**.

The screenshot shows the 'Success' pop-up window with the message 'YDP - Case Plan was successfully saved.' and an 'Ok' button highlighted with a red box. The background shows the 'Approval Request' form with the 'Approval History' table populated with two rows:

Requested By	Requested Date	Requested Of	Requested Comments	Disposition	Dispositioned I
Cgi Qa Test5	4/24/2020	Dys-Assessment Modtest23	Enter comments as necessary.	Pending	
Cgi Qa Test5	4/24/2020	Dys-Admissions Modtest25	Enter comments as necessary.	Approved	Cgi Qa Test5

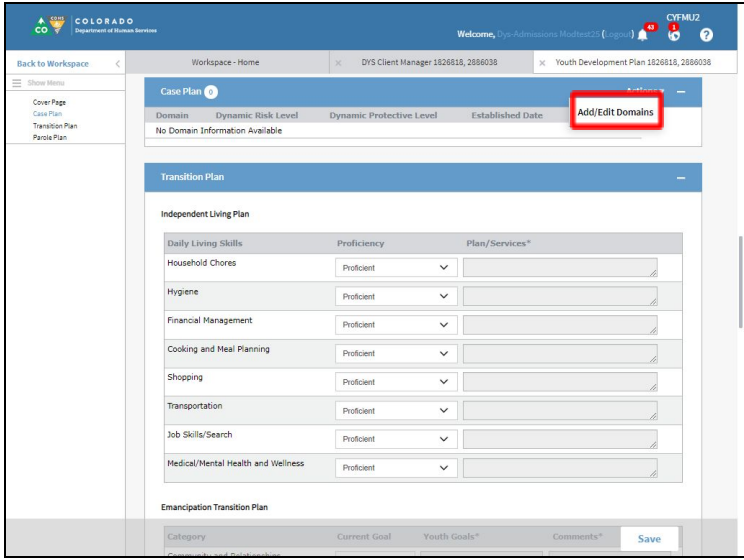
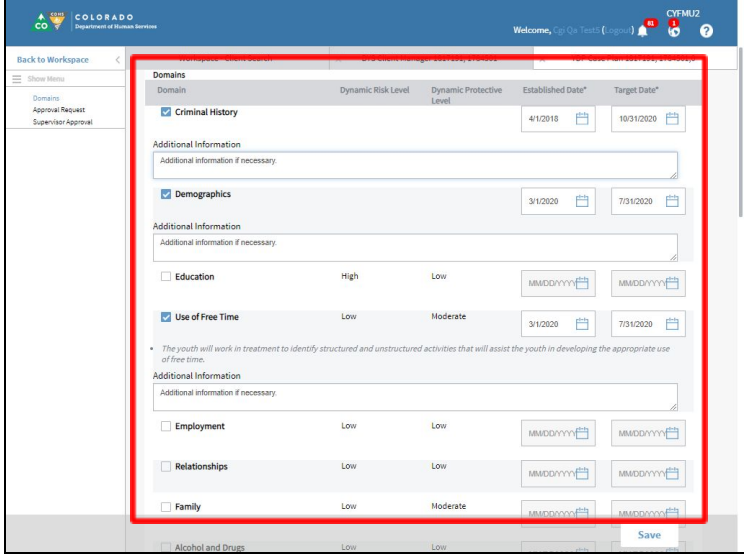
The 'Send to' dropdown is set to 'Dys-Assessment Modtest23'. The 'Requested by' field is 'Cgi Qa Test5' and the 'Requested Date' is '4/24/2020'. The 'Comments' field contains the text 'Enter comments as necessary.' A green 'Approval Requested' button is visible at the bottom left of the form. A 'Supervisor Approval' section is also visible at the bottom of the form, with radio buttons for 'Approved' and 'Denied'. A 'Save' button is at the bottom right of the form.



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Edit Case Plan

- If the Case Plan is Approved, and edits are made, the Case Plan must go through the approval process again.

Steps/Output	Screenshot
<p>In the <i>Case Plan</i> section:</p> <ol style="list-style-type: none"> Click the Actions dropdown. Select Add/Edit Domains from the dropdown. <p>The <i>YDP – Case Plan</i> page displays.</p>	 <p>The screenshot shows the 'Case Plan' interface. At the top, there is a navigation bar with 'Back to Workspace' and 'Workspace - Home'. Below this, there are tabs for 'DYS Client Manager' and 'Youth Development Plan'. The main content area is titled 'Case Plan' and contains a table with columns: 'Domain', 'Dynamic Risk Level', 'Dynamic Protective Level', and 'Established Date'. A red box highlights the 'Add/Edit Domains' button in the top right corner of the table. Below the table, there is a 'Transition Plan' section with a table for 'Independent Living Plan' and an 'Emancipation Transition Plan' section.</p>
<ol style="list-style-type: none"> Use the scroll bars, dropdown arrows, calendars, checkboxes, and text fields to complete the required fields and add additional information as necessary. 	 <p>The screenshot shows the 'Domains' page. A red box highlights the 'Domains' form. The form has columns for 'Domain', 'Dynamic Risk Level', 'Dynamic Protective Level', 'Established Date*', and 'Target Date*'. The 'Criminal History' domain is selected with a checkbox. Below this, there are sections for 'Additional Information' with text input fields. The 'Demographics' domain is also selected. Below that, there are sections for 'Education', 'Use of Free Time', 'Employment', 'Relationships', and 'Family', each with checkboxes and dropdown menus for risk levels and dates. The 'Alcohol and Drugs' domain is also visible at the bottom.</p>



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When all changes are complete:

4. Click **Save**.

The *Success* pop-up window appears.

Domain	Dynamic Risk Level	Dynamic Protective Level	Established Date*	Target Date*
<input checked="" type="checkbox"/> Criminal History			4/1/2018	10/31/2020
Additional Information Additional information if necessary:				
<input checked="" type="checkbox"/> Demographics			3/1/2020	7/31/2020
Additional Information Additional information if necessary:				
<input type="checkbox"/> Education	High	Low	MMDDYYYY	MMDDYYYY
<input checked="" type="checkbox"/> Use of Free Time	Low	Moderate	3/1/2020	7/31/2020
* The youth will work in treatment to identify structured and unstructured activities that will assist the youth in developing the appropriate use of free time. Additional Information Additional information if necessary:				
<input type="checkbox"/> Employment	Low	Low	MMDDYYYY	MMDDYYYY
<input type="checkbox"/> Relationships	Low	Low	MMDDYYYY	MMDDYYYY
<input type="checkbox"/> Family	Low	Moderate	MMDDYYYY	MMDDYYYY
<input type="checkbox"/> Alcohol and Drugs	Low	Low	MMDDYYYY	MMDDYYYY

In the *Success* pop-up window:

5. Click **Ok**.

Success
YDP - Case Plan was successfully saved.

Ok

Requested By	Requested Date	Requested Of	Requested Comments	Disposition	Dispositioned
Cgi Qa Test5	4/24/2020	Dys-Assessment Modtest23	Enter comments as necessary.	Pending	
Cgi Qa Test5	4/24/2020	Dys-Admissions Modtest25	Enter comments as necessary.	Approved	Cgi Qa Test5

Send to*
Dys-Assessment Modtest23

Requested by
Cgi Qa Test5

Requested Date
4/24/2020

Comments
Enter comments as necessary.

Approval Requested

Supervisor Approval

Approved
 Denied

Comments

Save



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Request Approval of a Case Plan

- Each time the Case Plan is edited after the Case Plan is Approved by a Supervisor; a new approval request is required.

Steps/Output	Screenshot
<p>1. Use the right scroll bar or use the left hand navigation menu to continue to the <i>Approval Request</i> section.</p>	
<p>In the <i>Approval Request</i> section:</p> <ol style="list-style-type: none"> Click the Send To* dropdown arrow. Select the appropriate individual. <p>Note: Client Manager Supervisors are shown in the drop-down list.</p>	



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4. Click in the **Comments** text field.
5. Enter comments are needed.

The screenshot shows the 'Approval Request' form in the Colorado Department of Human Services system. The 'Comments' text area is highlighted with a red rectangle. The form includes an 'Approval History' table, a 'Send to*' dropdown menu, and a 'Request Approval' button.

Requested By	Requested Date	Requested Of	Requested Comments	Disposition	Dispositioned
Cgi Qa Test5	3/4/2020	Mod Test14		Denied	Mod Test14
Cgi Qa Test5	2/14/2020	Mod Test14		Denied	Mod Test14

6. Click **Request Approval** to submit the request.

The screenshot shows the 'Approval Request' form in the Colorado Department of Human Services system. The 'Request Approval' button is highlighted with a red rectangle. The form includes an 'Approval History' table, a 'Send to*' dropdown menu, and a 'Request Approval' button.

Requested By	Requested Date	Requested Of	Requested Comments	Disposition	Dispositioned
Cgi Qa Test5	3/4/2020	Mod Test14		Denied	Mod Test14
Cgi Qa Test5	2/14/2020	Mod Test14		Denied	Mod Test14



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The **Request Approval** button updates to **Approval Requested**.

Note: The **Requested By** and **Requested Date** fields auto-populate with the current user and current date.

7. Click **Save**.

The *Success* pop-up window displays.



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In the *Success* pop-up window:

8. Click **Ok**.

Note: Approval is sent to the chosen Client Manager Supervisor and the button displays **Approval Requested** and is disabled.

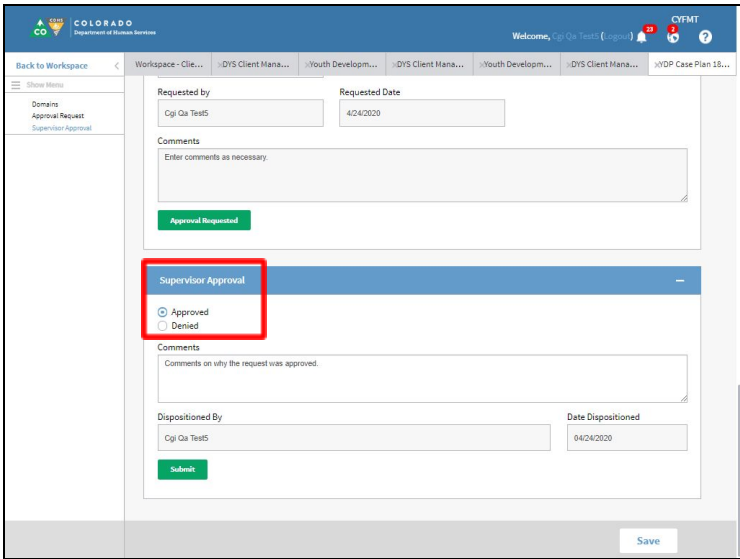
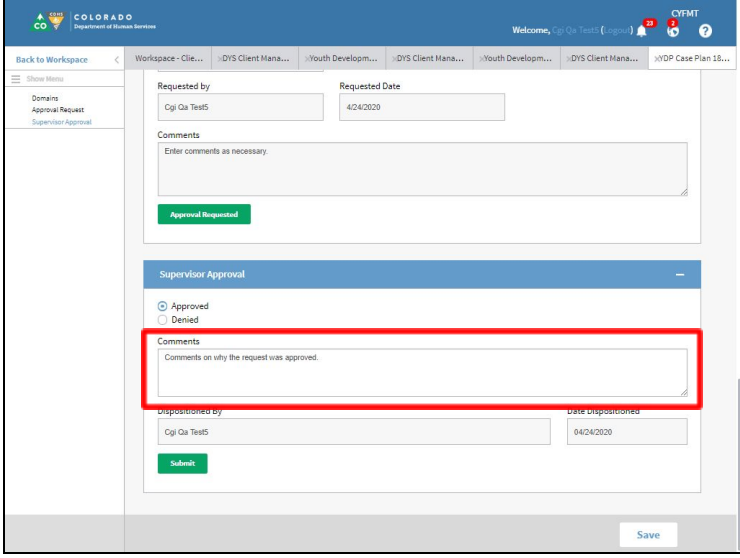
The screenshot shows the CDHS YDP interface. A success message pop-up window is displayed at the top, stating "Success: YDP - Case Plan was successfully saved." Below this, the "Approval Request" form is visible. The form includes an "Approval History" table, a "Send to*" dropdown menu, a "Requested by" field, a "Requested Date" field, and a "Comments" text area. A green "Approval Requested" button is located below the comments field. At the bottom of the form, there are radio buttons for "Approved" and "Denied", and a "Save" button. A red box highlights the "Ok" button in the success message pop-up.

Requested By	Requested Date	Requested Of	Requested Comments	Disposition	Dispositioned
Cgi Qa Test5	4/24/2020	Dys-Assessment Modtest23	Enter comments as necessary.	Pending	
Cgi Qa Test5	4/24/2020	Dys-Admissions Modtest25	Enter comments as necessary.	Approved	Cgi Qa Test5



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Client Manager Supervisor Approval of a Case Plan

Steps/Output	Screenshot
<p>In the <i>Supervisor Approval</i> section:</p> <ol style="list-style-type: none">1. Click the Approved or Denied radio button.	 <p>The screenshot shows the 'Supervisor Approval' section of the system. The 'Approved' radio button is selected and highlighted with a red box. The 'Denied' radio button is unselected. The 'Comments' field is empty. The 'Dispositioned By' field is 'Cgi Qa Test5' and the 'Date Dispositioned' is '04/24/2020'. The 'Submit' button is visible at the bottom.</p>
<ol style="list-style-type: none">2. Click in the Comments text field.3. Enter Comments. <p>Note: Comments are required on a <i>Denied</i> Case Plan.</p>	 <p>The screenshot shows the 'Supervisor Approval' section of the system. The 'Comments' text field is highlighted with a red box. The 'Approved' radio button is selected. The 'Dispositioned By' field is 'Cgi Qa Test5' and the 'Date Dispositioned' is '04/24/2020'. The 'Submit' button is visible at the bottom.</p>



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4. Click **Submit**.

The screenshot shows the 'Approval Request' form in the system. The 'Requested by' field is populated with 'Cgi Qa Test5' and the 'Requested Date' is '4/24/2020'. The 'Comments' field is empty. The 'Supervisor Approval' section has 'Approved' selected. The 'Dispositioned By' field is 'Cgi Qa Test5' and the 'Date Dispositioned' is '4/24/2020'. The 'Submit' button is highlighted with a red box.

The Supervisor Approval for the Case Plan is submitted and the **Submit** button is disabled.

Note: If the request is **Denied**, an alert is also sent to the individual in the **Requested By** field.

The screenshot shows the 'Approval Request' form in the system. The 'Requested by' field is populated with 'Mod Test13' and the 'Requested Date' is '5/26/2020'. The 'Comments' field is empty. The 'Supervisor Approval' section has 'Denied' selected. The 'Dispositioned By' field is 'Mod Test14' and the 'Date Dispositioned' is '6/2/2020'. The 'Submit' button is disabled and highlighted with a red box.