



TM Case – Manage Safety Assessments – 8 – Safety Plan Step Action Table



User

Case Worker and Case Worker Supervisor assigned to the Assessment or Case County.
Primary and Secondary Worker assigned to the Assessment or Case.

Process

This step action table describes the actions needed to view or edit the Safety Plan section of a selected Safety Assessment.

Introduction

- This is **Module 8: Safety Plan** of eight (8) modules in the *Manage Safety Assessments* process. Please ensure you have completed **Module 7: Safety Intervention** before beginning this module.
- The Safety Plan panel only displays if:
 - The Current or impending danger where actions DO NOT CONTROL FOR all danger option is selected in the *Current/Impending Danger Conclusion* section.
 - And, the Safety Plan option is selected in the *Safety Intervention* section.
- The Safety Plan panel has two (2) sections: *Safety Plan* and *Safety Plan Updates*.
- If the Safety Assessment is not approved:
 - The *Safety Plan* section is visible and can be updated.
 - The *Safety Plan Updates* section is hidden.
- If the Safety Assessment is approved and associated to an open Assessment or Case span:
 - The *Safety Plan* section is visible and disabled.
 - The *Safety Plan Update* section is visible and can be updated.

Important Note:

The steps demonstrating how to navigate to the *Safety Assessment* will be provided in the future as the navigation process is finalized.

This step action plan will provide the steps for completing the Safety Assessment details after it is created or accessed from an Assessment or a Case.

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Safety Plan (Prior to Approval)	
Step	Action
1	<p>In the <i>Left Navigation</i> panel.</p> <ul style="list-style-type: none"> Click Safety Plan. <p>This will take you to the Safety Plan panel of the Safety Assessment.</p>
2	<p>In the <i>Safety Plan</i> panel.</p> <ul style="list-style-type: none"> Click in the Identification of each family member and safety management provider... text box. Enter Comments. <p>Comments are required in this text box prior to submittal for approval.</p> <p>Note: When entering Comments in the Safety Assessment, a rich text editor displays with a character count in the lower right hand corner to aid in formatting your comments. The size automatically adjusts depending on the amount of text entered up to 4000 characters. Notes can be copied and pasted into this field.</p>
3	<p>In the <i>Safety Plan</i> panel.</p> <ul style="list-style-type: none"> Click in the Description of actions to be taken... text box. <i>Comments From Current/Impending Danger Section – Date</i> are pre-populated in the text box. Edit or enter Comments, as needed. <p>Comments are required in this text box prior to submittal for approval.</p>
4	<p>In the <i>Safety Plan</i> panel.</p> <ul style="list-style-type: none"> Click in the Parental acknowledgement of current or impending dangers... text box. Enter Comments. <p>Comments are required in this text box prior to submittal for approval.</p>
5	<p>In the <i>Safety Plan</i> panel.</p> <ul style="list-style-type: none"> Click in the Caseworkers activities to oversee the Safety Plan text box. Enter Comments. <p>Comments are required in this text box prior to submittal for approval.</p>



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6	<p>In the <i>Safety Plan</i> panel.</p> <ul style="list-style-type: none">• Click in the Caseworkers activities to oversee the Safety Plan text box.• Enter Comments. <p>Comments are required in this text box prior to submittal for approval.</p>
7	<p>Save the changes to the <i>Safety Plan</i> panel.</p> <ul style="list-style-type: none">• Click Save.• A message displays stating the Safety Assessment has been saved successfully or that information is missing. <p>The Safety Assessment must be successfully saved prior to submittal for approval.</p>
8	<p>From the Safety Assessment.</p> <ul style="list-style-type: none">• Click the Actions menu in the <i>General Information</i> panel.• Select the Approvals menu item to submit the Safety Assessment for approval. <p>Note: See the <i>TM Case – Manage Safety Assessment Approvals</i> for further information on approvals.</p>



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Safety Plan Update (After Approval)	
Step	Action
1	<p>In the <i>Left Navigation</i> panel.</p> <ul style="list-style-type: none"> Click Safety Plan. Scroll to the Safety Plan Updates table. <p>The <i>Safety Plan Update</i> table displays as the last section in the Safety Plan after the Safety Assessment is approved. The other <i>Safety Plan</i> sections will be read-only.</p>
Add Safety Plan Update	
2	<p>In the <i>Safety Plan Updates</i> table header.</p> <ul style="list-style-type: none"> Click the Actions drop-down arrow. Select Add Safety Plan Update.
3	<p>In the <i>Add Safety Plan Update</i> pop-up window.</p> <ul style="list-style-type: none"> The Date Updated is pre-populated with Today’s date. To change the date: <ul style="list-style-type: none"> Click in the Date Updated field. Type the date with a MM/DD/YYYY format or enter the date using the calendar option. The Updated By field defaults to the signed on user and cannot be changed. The Safety Plan Remains in Place? toggle defaults to Yes. <ul style="list-style-type: none"> Click the No toggle to designate the Safety Plan not remain in place. Click This is the final update/end date checkbox to designate the final update. The default is unchecked. Click in the Comments field to add notes for this update. Click Save to save the addition or Cancel to close the window without saving. <p>The Safety Plan Update record displays in the Safety Plan Update table sorted by Date Updated, oldest to newest.</p>
Edit Safety Plan Update	
4	<p>In the <i>Safety Plan Update</i> table.</p> <ul style="list-style-type: none"> Click the appropriate Date Updated hyperlink.
5	<p>In the <i>Edit Safety Plan Update</i> pop-up window.</p> <ul style="list-style-type: none"> Make changes or additions as needed. Click Save to save the changes or Cancel to close the window without saving.



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Delete Safety Plan Update	
7	In the <i>Safety Plan Update</i> table. <ul style="list-style-type: none">• Click the appropriate Date Updated hyperlink.
8	In the <i>Edit Safety Plan Update</i> pop-up window. <ul style="list-style-type: none">• Click Delete.• A message displays confirming the deletion.• Click Yes to delete the Safety Plan update or No to cancel the deletion. The Safety Plan Update will be removed from the <i>Safety Plan Update</i> Table.