

## Automated Case Planning

Fully integrated with Ce Assessments, **Ce Planning** is a web-based system that allows Community-based Corrections staff to initiate individualized case plans targeting each client's specific needs. Ce Planning links assessment results to the process of individualized case planning and appropriate service provision.



Ce Planning provides staff the ability to create goals with clearly defined action steps for each identified criminogenic need and tracks client progress towards each goal. Officers can also manage case plans in Ce Planning or through a Microsoft Word™ integration, track case plan milestones and manage Title IV-E case plans and documentation.

AutoMon's Ce Assessments customers have access to Ce Planning as a part of their Ce Assessments subscription.

Ce Planning provides advanced functionality enabling the Title IV-E Pre-Placement and Placement Case Plans, as well as Transitional Independent Living and Non-Minor Dependent case plans as standard offerings for eligible juveniles. These case plans can be created and managed within Ce Planning with the ability to print for required signatures.

### Ce Planning

Created: 12/13/2016

#### Client Information

Name: Pamela Adult	Id#: 123456
DOB: 9/16/1958	Gender: Female
Caseload: pdancil	Officer: Pamela Dancil

#### Plan Information

**Problem Statement:** When I drink, I get very angry and violent. I have been known to hurt the people I love the most when I am drunk.

**Goal Statement:** I will attend AA and begin abstaining from alcohol.

### Adult Case Plan Report

**Capture Signature**

To capture your signature click Sign, then Done. When you are satisfied with your signature, click Save.

#### Needs to be Addressed

**Family Dynamics - Cancelled on 2/9/2017**

- Improve volatile relationship with my husband - Cancelled on 2/9/2017
  - Attend family counseling 3x/ week for the next 30 days.
    - Assigned to Pamela Adult      Target Date 1/6/2017      Cancelled on 2/9/2017

**Supervision**

- Example goal - Successful on 2/9/2017
  - Will attend family counseling once per week.
    - Assigned to Pamela Adult      Target Date 3/31/2017      Successful on 2/9/2017
- Example Goal 2 - Successful on 2/9/2017
  - Example action step
    - Assigned to Pamela Dancil      Target Date 2/23/2017      Successful on 2/9/2017
  - Example action step
    - Assigned to Annie Adcox      Target Date 2/24/2017      Successful on 2/9/2017



# Ce Planning

Automated Case Planning

**Dashboard**  
Monitor key metrics of case plans for your agency.

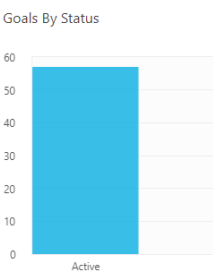
All Case Plans ▾ August 1, 2017 - August 31, 2017 ▾

- ✓ All Case Plans
- Adult Case Plan
- Adult IAP
- Juvenile Case Plan
- Juvenile IAP
- Non-Minor Dependent Assessment Case Plan
- Title IV-E Placement Case Plan
- Title IV-E Pre-Placement Case Plan

**119** ACTIVE PLANS      **2** PLANS DUE IN DATE RANGE      **3** PLANS LATE

**3** CLIENTS WITH NO ACTIVE PLANS      **21** TITLE IV-E ELIGIBLE CLIENTS

**Goals By Status**



Ce Planning's reporting dashboard includes various metrics that provide important insights into an agency's case planning activities, including the number of Active Plans, Plans Due in Date Range, Plans Late, Steps Late, Clients with no Active Plans, Goals by Status and Title IV-E Eligible Clients, a specific Officer & assists management in assigning future Investigation assignments.

**Client Overview: Zachary Adams #2004465**

Gender: Male      Caseload/PO: pdencil/Pamela Dancil  
 Date of Birth: 03/01/01      Supervision Start Date:  
 Race: White      Maximum Expiration Date:  
 Ethnicity: Hispanic      Most Serious Charge:  
 Title IV-E Eligible: Yes

**Assessment History**

Assessment	Outcome	Date Completed
JAMS Assessment	Low	6/15/16

**Case Plans**

Plan Type	Date Created	Last Updated	Updated By	Last Milestone
Title IV-E Pre-Placement Case Plan	07/26/16	10/03/16	Pamela Dancil	05/15/17
Title IV-E Placement Case Plan	11/03/16	07/05/17	Pamela Dancil	
Transitional Independent Living Plan	11/03/16	11/03/16	Pamela Dancil	
Non-Minor Dependent Assessment Case Plan	11/03/16	11/03/16	Pamela Dancil	05/12/17

**Case Plan Documents**

Document Name	Date Created	Last Updated	Updated By
Title IV-E Minor & Family.docx	11/03/16	11/03/16	Pamela Dancil
Evaluation of IR and RC.docx	11/03/16	11/03/16	Pamela Dancil
90 Day Transition Plan.docx	11/03/16	11/03/16	Pamela Dancil

The Client Overview provides important client information pertaining to assessment history, all active case plans. From the Client Overview screen, staff can easily navigate to view assessment reports, manage & associated case plan documents. From the Client Overview, staff can manage active case plans or create a new case plan.

Case Plans are easily created in Ce Planning by identifying Problem and Goal Statements, Needs to be addressed (as identified through the Risk and needs Assessment), Action Steps and Milestones. The Case Plan is a dynamic document made available through Ce Planning for continual updates and modifications through completion.

**Client Overview: Rodrigo Abramtchouk #2003678**

Gender: Male      Caseload/PO: pdencil/Pamela Dancil  
 Date of Birth: 08/29/88      Supervision Start Date:  
 Race: Unknown      Maximum Expiration Date:  
 Ethnicity: Hispanic      Most Serious Charge:  
 Title IV-E Eligible: Yes

**Assessment History**

Assessment	Outcome	Date Completed
CAIS Assessment	High	6/26/12

**Problem and Goal Statements**

**Problem Statement**  
 My problem is that I use cocaine, marijuana, meth and other illegal drugs, prostitute for drugs, food and a place to live, gang bangers, threaten, assault and stab people. I do most of these things when I am with other gang members or when I am angry and reacting emotionally to things. My actions have caused me to be on probation. If I continue doing these things, I will end up being released or re-arrested.

**Goal Statement**  
 Associate with positive influences - not gang affiliates - and seek immediate treatment for substance abuse

**Needs to be Addressed**

- Vocational Inadequacy (Low on 6/30/17) 0 of 1 Goals Closed
- Alcohol and/or Drug Abuse (Low on 11/1/16) No Goals
- Family History Problems (Low on 9/26/16) No Goals

[Add Goal](#)