CASE PLAN MODULE

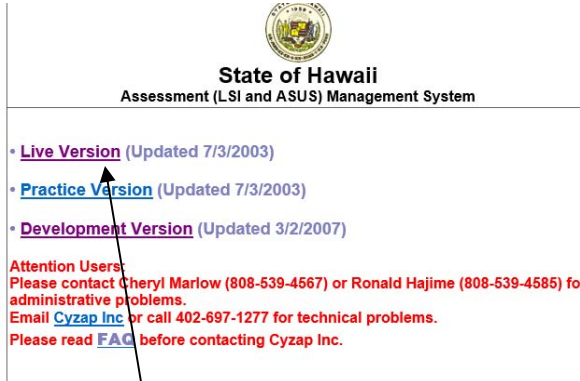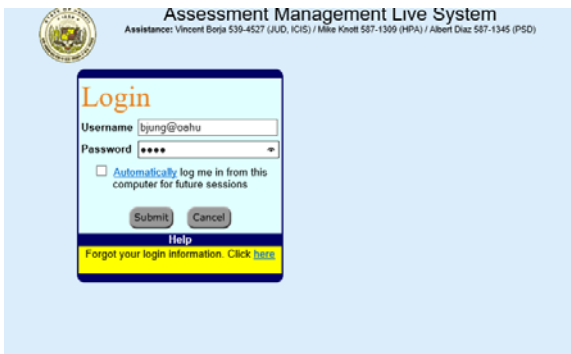1. **Click URL site:** http://dochawaii.cyzap.net/ to enter into the Assessment (LSI and ASUS) Management System.

2. Select **Live Version** to go to the Assessment Management Live System Login page.

3. Login using your Cyzap Username and your user password which will take you to the Main Menu:

4. Enter the new Case Plan module from Cyzap's main menu:

    a. Type in the offender's SID # or First/Last name and click "Submit." This will take you to Cyzap's Main Menu screen.
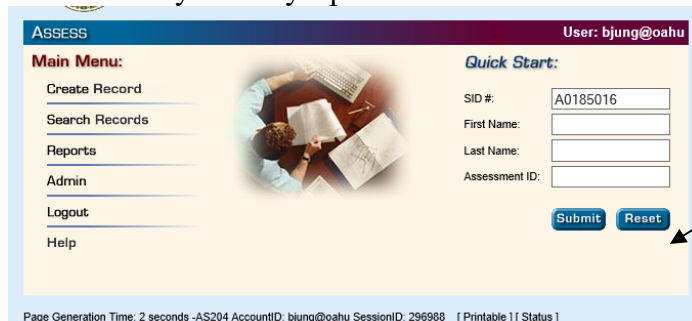
Then click on "New Case Plans" which will take you to the Officer
Dashboard Profile Screen.

I. Officer Home Page

The Cyzap system opens to the officer's Home Page, which will allow the officer to view all of his/her dashboards, such as the Officer Demographics, Trainings and Competencies, Caseload Profiles and Summary, and Case Plan dashboards. The Home Page also includes information on the officer's professional classification, such as Work Class, Branch and Agency, and current Supervisor.
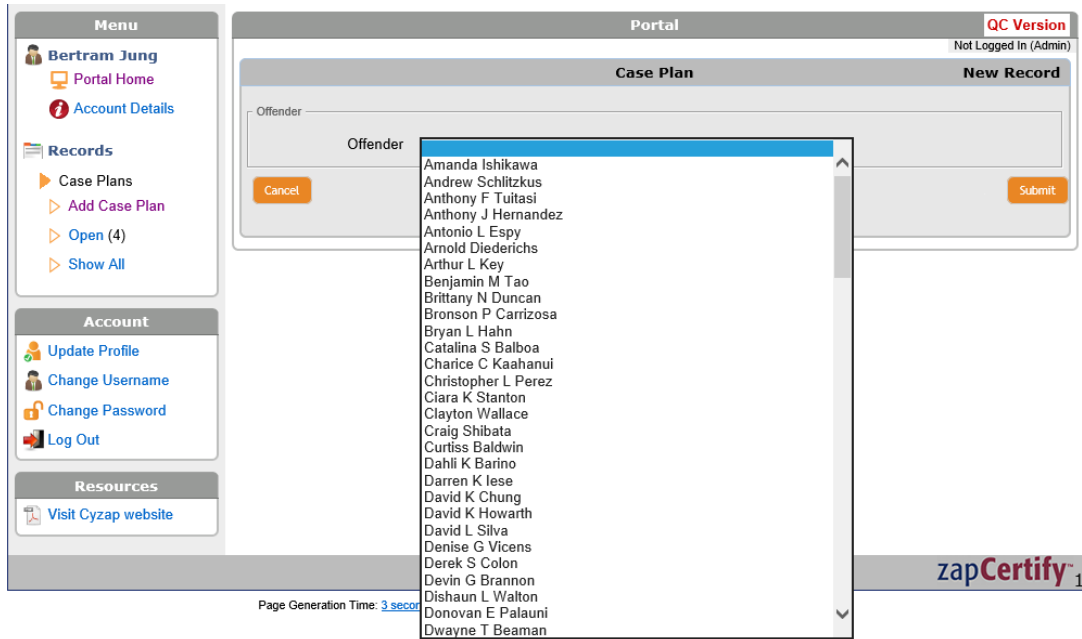

You can select "Add Case Plan" to enter new case plan information on any offender you currently have in your caseload. If you have already created a case plan, you can view the case plan entries by 1) click on the "Case Plan" tab (for table view), or 2) click on "Open" (for record view) of the existing case plan.

Note: If the officer wishes to review the case plans previously submitted of offenders within their active caseload, the officer can click on the "Open" link to view the case plan created by the officer. The officer can also click on the Dashboard's Case Plan tab to see a summary of all case plans created by the office.
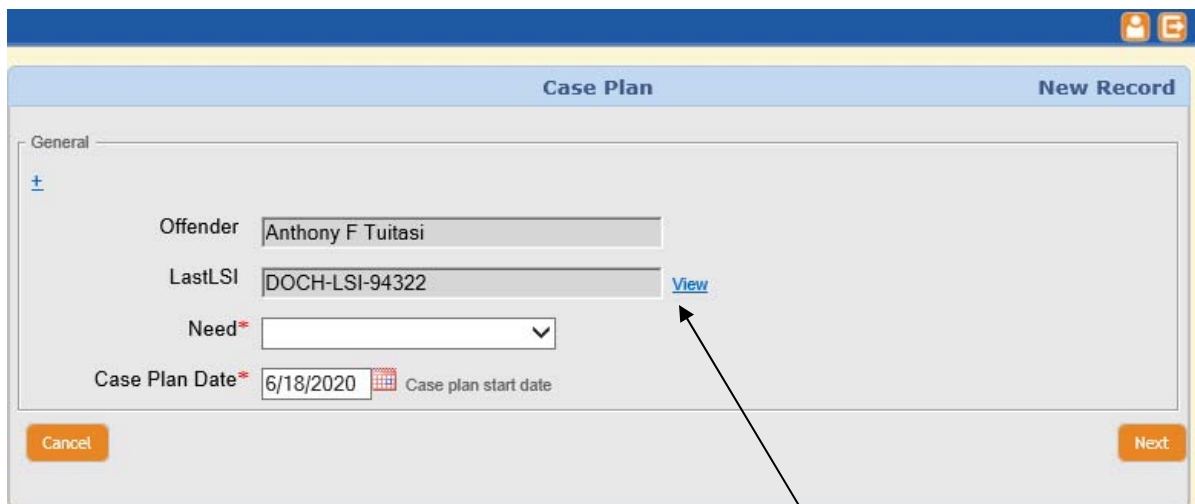
II. Create New Case Plan

A new case plan can be created by Clicking on "Add Case Plan."

The officer selects the offender they wish to create a case plan: A drop down menu allows the officer to select the offender by name.


Cyzap automatically selects the most current or last LSI-R. By default, the *Case Plan Date* is the case plan start date defaulted to the current entry date. The officer can override the default date by manually entering the start date.


Note: Notice that the most current LSI used is identified (DOCH_LSI-94322) in the LastLSI Box. The officer can see the LSI-R/ASUS Management Summary form by clicking on the *View* hyperlink.

The officer selects the offender's targeted Need using the drop-down menu. The offender's needs are listed in order from the highest to lowest risk percentiles. Identifying the targeted need is required to move on to the case plan's goal/objective.
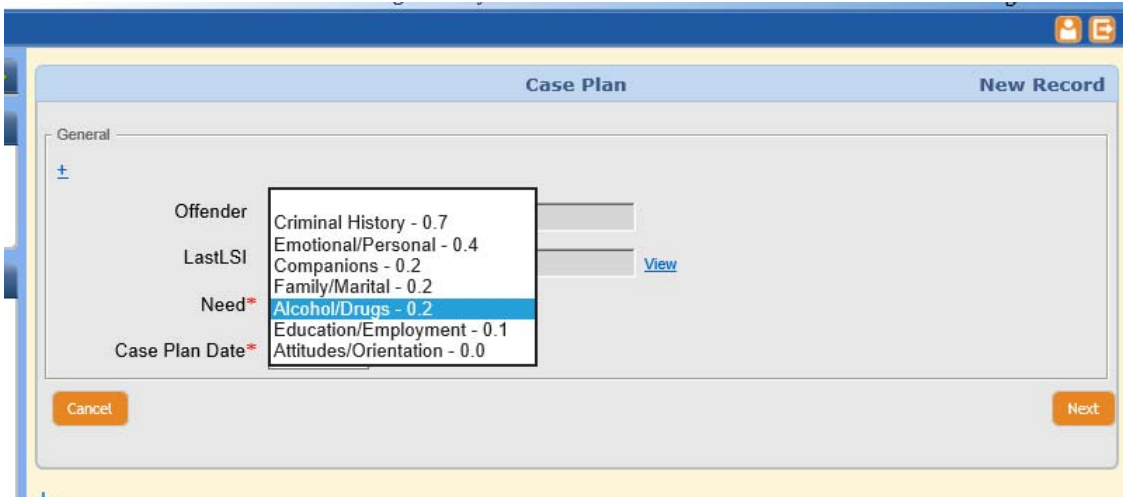
Note: For demonstration purposes, the officer selects Alcohol/Drugs as the targeted Need.

The Need, Stage of Change, and Goal are required entries (illustrated by the red asterisks).
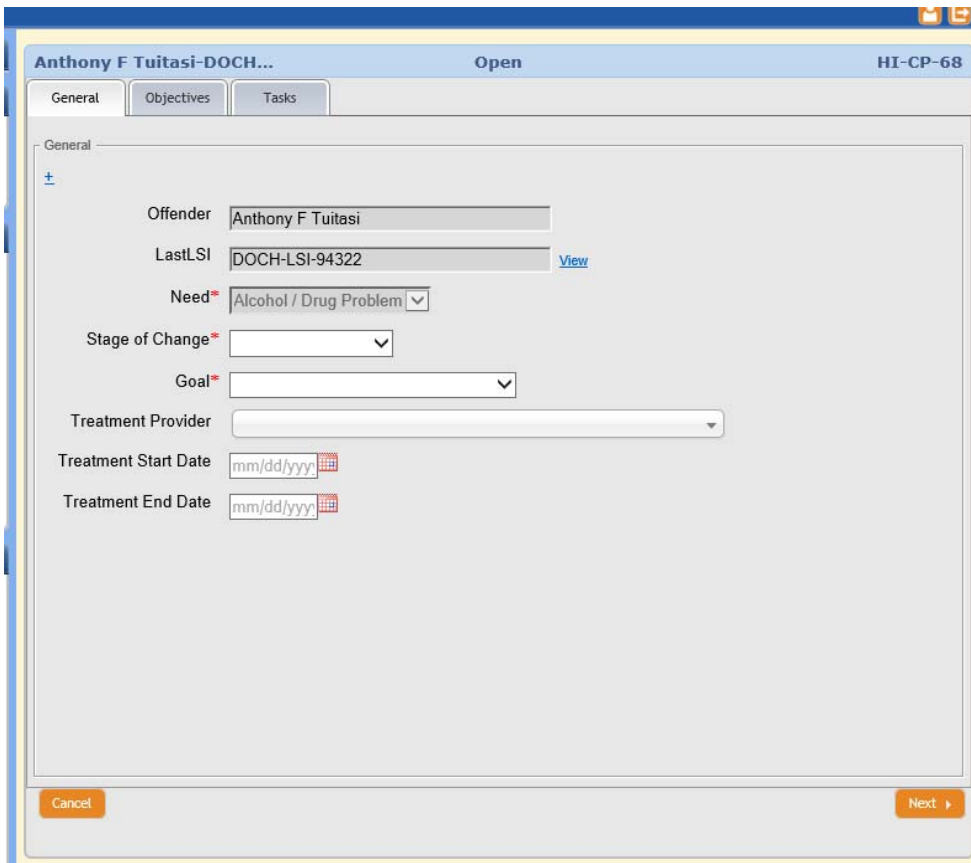
Note: Notice that the targeted Need, "Alcohol/Drug Problem" is highlighted in the Need entry box.

The officer selects the Stage of Change using the drop-down menu.

The officer selects the Goal using the drop-down menu.

The officer selects the Treatment Provider via a pull-down menu. Note: The Treatment provider is not a required field, because not all offenders will have a specific treatment provider.

IF the officer identifies a Treatment Provider, a Treatment Start Date and Treatment End Date should be selected.

A: Select Case Plan Objectives: The officer "clicks" on the Objectives tab.

The officer clicks on the Objectives tab, which opens up a window that lists pre-identified Objectives matched to the treatment goal – "Maintain a Clean and Sober Lifestyle." The officer can select multiple objectives. If the officer chooses an objective that is not listed in the Objective menu, the officer can manually add an objective. The officer enters the number of months targeted for the completion of the objective, which will automatically generate a due date.

B: Select Case Plan Tasks: The officer "clicks" on the Tasks tab.

The officer clicks on the Tasks tab, which opens up a window that lists pre-identified Tasks matched to the treatment goal – "Maintain a Clean and Sober Lifestyle." The officer can select multiple tasks. If the officer chooses a task that is not listed in the Tasks menu, the officer can manually add a task.

III. Case Plan Submission

Once the officer completes the required (minimal) Need, Stage of Change, and Goal fields, and adds the Objectives and Tasks - the officer then clicks on the *Create Case Plan*, which will add a case plan record into Cyzap. The officer can choose to exit Cyzap without adding the objectives and tasks, with the anticipation of returning later to add the objectives and tasks.

Cyzap will not allow the creation of a case plan unless all required fields are selected. If the officer clicks on the *Create Case Plan* button without entering data in one or all of the required fields, CYZAP will prompt the officer to enter the missing information, for example, if the officer did not add the Stage of Change, the system will prompt the officer to select a Stage of Change, before it can create the case plan.

Please correct the following problems:

Stage of Change: This field is required
Goal: This field is required

| Anthony F Tuitasi-DOCH...	Open	HI-CP-61

General	Objectives	Tasks

Tasks

Select	Task	Due in months	Due Date
☑	Apply for medical insurance within	3	08/11/2020
☐	Attend of AA/NA meetings per week		
☐	Attend AA/NA meetings and provide signature verification within		
☐	Complete Thinking Report		
☑	Enter substance abuse treatment with the following programs	3	08/11/2020
☑	Identify problems because of alcohol/drug use.	2	07/11/2020
☐	Make assessment appointment within		
☐	Obtain Bus Pass within		
☐	Submit to drug testing		
☐	Other:		

IV. View the Submitted Case Plan:

The Officer should periodically verify if the pertinent case plan(s) have been accurately entered into the system. The officer can re-enter the system by opening their case plan folders and view the case plans currently in the system. If the officer wants to add objectives and tasks to named offender's case plan, the officer will "click" on the "eye ball" icon to select the case plan.
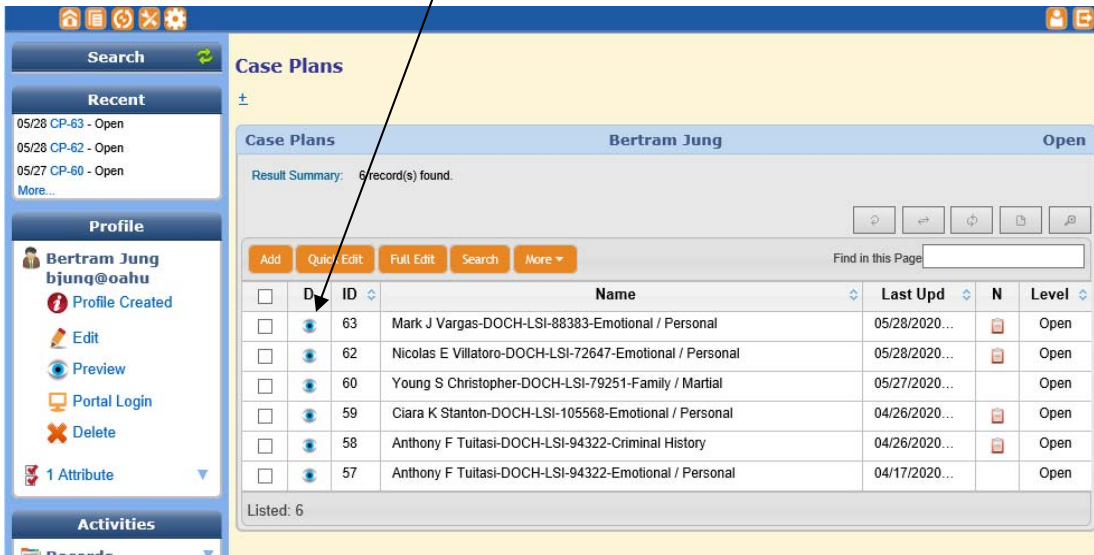
V. Change Case Plan Data using the Update Case Plan button

The officer will then see the case plan record, which includes pertinent case plan information, such as the offender's name, targeted need, identified goal, and treatment provider, etc. The officer can review objectives and tasks due dates and completed actions. The officer can also assess whether the offender has completed the targeted objectives or tasks by clicking on one of three assessment buttons:
(I – Incomplete; P – Partial Completion; C – Completed).

Once the offender's case plan is verified, the officer will "click" on the Update Case Plan button to add additional Objectives or Tasks.

Select the Assign tab, if the officer who created the case plan intends to assign the case to a new officer.

After updating and evaluating the offender's case plan, the officer can choose to terminate (close) the case plan if the offender has completed or fulfilled all objectives, tasks, and treatment conditions. By selecting the "Closeout Case Plan" button, Cyzap will then close the case plan.

Caution: Once the case plan is closed, the officer will not be allowed to enter or update additional objectives or tasks.

VI. Printing the Case Plan

The officer can also print the submitted case plan by clicking on the Print Case Plan button. The officer can now see the case plan created by the officer. Once the officer prints the case plan, a copy of the case plan, which includes a signature block and date, can be given to the offender.

DOCHIQA

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General Information

Offender	Need	Case Plan Date	Stage of Change
Anthony F Tuitasi	Alcohol / Drug Problem	6/18/2020	Contemplation

Goal	Maintain a clean and sober lifestyle
LastLSI	DOCH-LSI-94322

Objectives

Objective	Due in months	Due Date	Completed
Abstain from illicit drug/alcohol/unprescribed medication use for	12	6/18/2021	Incomplete
Complete substance abuse treatment within	12	6/18/2021	Incomplete

Tasks

Task	Due in months	Due Date	Completed
Attend of AA/NA meetings per week	3	9/18/2020	Incomplete
Complete Thinking Report	3	9/18/2020	Incomplete
Enter substance abuse treatment with the following programs	12	6/18/2021	Incomplete

Provider	Action With Aloha (484-4489)		
Treatment End Date	6/3/2021	Length	12.2 months

Signature

_____   Date:_____

VII. Officer Case Plan Dashboard

The Officer will have access to his/her case plan dashboard by clicking on the officer's Home Page tab. This dashboard will allow the officers to review all case plans created by the officer.

The Officer will then click on the case plan dashboard tab, which will allow the officer to review all officer-created case plans.

Case Plan Dashboard: The Case Plan dashboard allows the officer to see all created case plans. The dashboard is a "quick glance" of pertinent case plan fields, such as the offender name, case plan date, goal, and objective/task. Green color font indicates Objectives/Tasks are completed, Purple font reflects partially completed Objectives/Tasks, and Red font reflects unfinished/incomplete Objectives/Tasks.

Select Preview Record to Print your case plan dashboard.