

## SECTION 4005 – CASE PLANNING

<b>SUMMARY STATEMENT:</b>	The Initial Case Plan shall be completed within 10 calendar days from the date of the Initial Determination of need for on-going Adult Protective Services (APS).
<b>BASIC CONSIDERATION</b>	The Case Plan is the basis for the activities that the case manager, client, family and other resources do to reduce risk and ensure that basic needs are met.
<b>PROCEDURE</b>  <b>Standard Ongoing</b>	<p>The client shall be actively involved in the planning process to the greatest extent possible.</p> <ul style="list-style-type: none"> <li>• Ongoing APS clients must not only consent to ongoing services but should also understand the purpose and intended outcome of the case plan. <i>(Refer to O.C.G.A § 30-5-5(c) for legal requirement for consent).</i></li> <li>• Strengths, needs, goals and steps should be discussed and agreed upon with the APS client <i>(refer to chapter 1 of this manual for APS Guiding Principles).</i></li> <li>• Case Goals and Steps shall be written in the plan with dates for expected completion of each step and goal.</li> <li>• Case Plans shall not extend beyond 6 months without a formal redetermination and review of initial plan</li> <li>• APS case manager shall visit with the client at least once every month.</li> <li>• APS case managers shall document discussions and achievements of the case plan goals and steps at monthly visits with the client, and with any others that might have knowledge or otherwise be participating in the case plan (collateral contacts). This is the primary task of ongoing case management visits each month.</li> <li>• The APS case manager shall discuss with the client factors that keep the ongoing APS client at risk.</li> </ul> <p><b>Signature requirement</b></p> <p>The client must sign (or make his/her mark) the Case Plan as written documentation of his/her commitment to</p>

**PROCEDURE contd.**

the plan. Failure to do so will prevent APS from moving forward with ongoing service provisions.

**Signature exception:**

- if the client was unable to sign the case plan but the client has given verbal agreement; or
- if the adult is a person under guardianship, the legal guardian can sign as the adult's legal representative.

**Note:** Verbal consent must be document in the case record.

**Additional Signatures:**

- Case Manager
- Supervisor
- Other individuals taking a significant role in the goals and steps of the plan (i.e. caregiver, partner, adult child)

**Note:** The case plan is not a legal document.

Signatures are requested to demonstrate commitment on the part of all parties to the plan. Refusal by other involved individuals to sign the plan will not affect APS' ability to provide ongoing services.

The signed Case Plan shall be filed in the client's physical case record and uploaded into the electronic case record. The client shall be given a copy of the signed plan.

**Short-Term Ongoing**

A standard Short-term case plan shall be completed for all Short-Term Ongoing cases.

On the standard form, located in electronic data management system, identify the specify service being provided through the Short-term ongoing service:

- TERF permanency
- ADRC follow-up
- Guardianship/Conservatorship petition pending

The plan shall be printed out and a copy provided to the client.

**Signature Requirement**

Plan shall be presented to client for signature. The signature of the client or legal representative is optional. Client's refusal to sign the case plan will not affect case manager's ability to provide ongoing services as long as

**PROCEDURE contd.**

all other consent standards have been met (*refer to section 4003 of this chapter*).

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**REFERENCES**

[Georgia's Disabled Adults and Elder Persons Protection Act, O.C.G.A §30-5-1, et.seq.](#)