

5101:2-20-16

**Case planning and case review for adult protective services.**

(A) The county department of job and family services (CDJFS) or its designated agency shall develop a case plan for each adult who receives protective services. The case plan shall be part of the case record.

(1) A case plan shall be developed by the CDJFS or its designated agency no later than thirty calendar days after whichever of the following occurs first:

(a) The case decision indicates the need for services and the adult agrees to the provision of protective services.

(b) The adult requests services and the CDJFS or its designated agency determines that the requested services are needed and can be provided.

(2) Each case plan shall include, but is not limited to, the following:

(a) The identified concerns.

(b) The protective services objectives.

(c) The services that will be provided and the service provider(s).

(d) Effective dates of the protective services case plan.

(e) Signature of the adult. If the adult refuses to sign the plan, the worker shall document the reason in the case record and/or petition the court pursuant to paragraph (H)(1) of this rule.

(3) In the development of the case plan, the CDJFS or its designated agency must involve the adult and significant other(s) which may include relatives, friends, caregivers and/or neighbors to the extent possible.

(4) The case plan shall be based upon the least restrictive services available to meet the needs of the adult.

(5) The CDJFS or its designated agency shall be responsible for the delivery of services or may arrange service delivery through the use of referrals, contracts or written agreements.

(B) The case plan shall be effective once the adult signs the case plan indicating their agreement to participate in services, or when the court orders the provision of protective services if the adult is incapacitated or incompetent.

(C) The CDJFS or its designated agency shall make face-to-face contact with the adult at a minimum of one time per calendar month in order to monitor progress on the case plan objectives. The caseworker shall document the following information in the case record after each contact:

- (1) Date caseworker met with the adult.
  - (2) Status of services currently in place, indicating whether the services are addressing the concern.
  - (3) Any new services that are needed due to the adult's current level of risk.
- (D) If the initial attempt to complete a face-to-face contact is unsuccessful, the CDJFS or its designated agency shall make a minimum of two additional attempts to complete the face-to-face contact within the calendar month. These attempts shall be documented in the case record.
- (E) No later than ninety days after services have been put in place, the CDJFS or its designated agency shall reassess the need to continue providing protective services. The caseworker shall determine if services should be maintained, amended or terminated.
- (F) If the adult continues to be in need of protective services, the CDJFS or its designated agency shall continue the case plan for the next ninety days and every ninety days thereafter until the case can be closed. The case plan shall follow the requirements outlined in paragraphs (A)(1) and (A)(2) of this rule.
- (G) The CDJFS or its designated agency shall amend the case plan within five working days if there is a change in any of the following:
- (1) The concerns warranting the need for protective services.
  - (2) Principals of the case.
  - (3) Services being provided.
- (H) The CDJFS or its designated agency shall terminate adult protective services in the following circumstances:
- (1) If requested by the adult who is the recipient of the protective services. However, if the CDJFS or its designated agency determines that an adult is in need of protective services and the adult is incapacitated or incompetent, the CDJFS or its designated agency shall petition the court for an order authorizing the provision of protective services.
  - (2) If the adult is no longer in need of protective services based on the reassessment of risk.
  - (3) If the adult leaves the CDJFS area of jurisdiction. In such an instance, the CDJFS shall make a referral to the new county or state of residence, if known, and upon request of the authorized receiving agency, provide

appropriate information to facilitate determination of need for adult protective services in the new county or state of residence.

(4) If the adult has been placed in an institution, unless the institutionalization is court ordered.

(5) If the adult dies.

(I) The decision to close the case and terminate protective services shall be approved by the supervisor and documented in the case record.

Replaces: 5101:2-20-02

Effective:

Five Year Review (FYR) Dates:

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Certification

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Date

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