

Introduction

The CA:tCH Safety Plan Portal allows you to enter Participant information and upload Safety Plans, edit Participant information, and view Safety Plans and Participant information. It is a Microsoft SharePoint site, managed by WISHIN. Once you enter a new Participant and Safety Plan, or modify information, the information is sent to WISHIN Pulse.

Before You Begin

You must have a user ID and Password. The Participant must already exist in the Portal page in order to add an Action.

Actions

Actions document activities related to a Participant and/or Safety Plan. To navigate to the Actions tab:

- Open the CA:tCH Safety Plan Portal, and log in
- Choose **Actions** from the **Quick Links** section, or from the left navigation tab.
- **To Add a New Action:** Select **New** at the top-left of the Actions List

Adding an Action

- Choose the appropriate **Participant** from the Participant drop-down list.
- Choose the appropriate Action from the **Action** drop-down list. Definitions of the available Actions are on the second page of this document.
- Enter the appropriate date the **Action** took place.
- Choose the **Save** button in the top right of the page to save the **Action**.
- Other tips:
 - The Facilitator Organization and Facilitator Name will automatically be populated with your information after you **Save**.
 - The Action will automatically be sent to WISHIN Pulse to update the information about the Participant and/or Safety Plan.
 - The Action will be added to the Participant.

Viewing Actions Related to Participants

From the Participant page, you can double-click on a Participant to see any Actions related to the Participant.

Link to CA:tCH Portal:

<https://wishin.sharepoint.com/sites/CATCH>

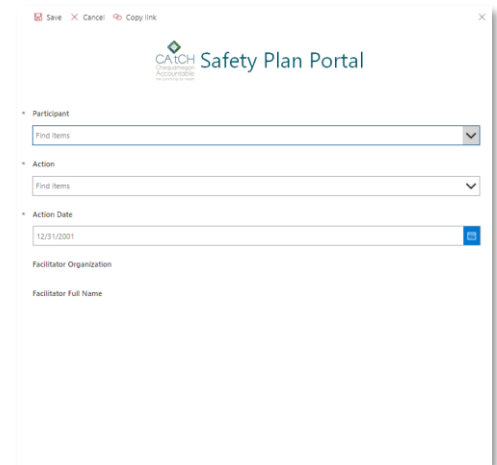
Need Help?

For System Questions:

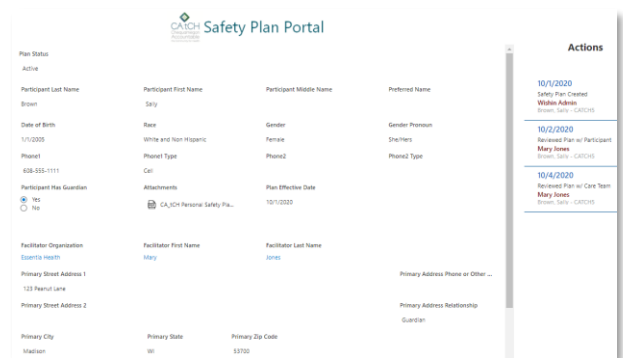
Laura Widder,
Project Director, WISHIN
lwidder@wishin.org
608-274-1820

For Safety Plan content or policy questions:

Wendy Kloiber, Director
Resilience Alignment
Beekeepers
wendykloiber@gmail.com
715-209-8044



The screenshot shows the 'Add Action' form in the CA:tCH Safety Plan Portal. It includes dropdown menus for 'Participant' and 'Action', both with 'Find Items' search boxes. There is an 'Action Date' field with a calendar icon and a 'Save' button. Below these are fields for 'Facilitator Organization' and 'Facilitator Full Name'.



The screenshot shows the participant details page for 'Mary Jones'. The details are organized into sections: Personal Information (Name, Date of Birth, Phone, Email, Gender, Race, Religion, Ethnicity, Plan Effective Date), Health Information (Allergies, Attachments), and Contact Information (Facilitator Organization, Facilitator Name, Facilitator Last Name, Primary Address, Primary City, State, Zip Code). On the right side, there is a list of 'Actions' with columns for Date, Action Name, and Status.

Participant Last Name	Participant First Name	Participant Middle Name	Preferred Name
Jones	Mary		Mary Jones

Date of Birth	Race	Gender	Gender Preference
1/1/2000	White and Non-Hispanic	Female	She/Her

Facilitator Organization	Facilitator First Name	Facilitator Last Name
Epineix Health	Mary	Jones

Primary City	Primary State	Primary Zip Code
Milwaukee	WI	53202

Date	Action Name	Status
10/1/2020	Safety Plan Created	Wishin Admin (WISHIN-SAP-CA:TCH)
10/2/2020	Revised Plan for Participant	Mary Jones (WISHIN-SAP-CA:TCH)
10/4/2020	Revised Plan for Care Team	Mary Jones (WISHIN-SAP-CA:TCH)

Actions and their Descriptions

The following table shows the list of Actions. The Description section explains the Action and when it should be used.

Action	Description
Safety Plan Created	Automatically added when a facilitator creates a new Participant and Safety Plan
Facilitator Revised	Facilitator changed at request of participant or to reflect agency staff changes.
Plan Engaged	Plan was used at a time of crisis, to de-escalate a potential crisis, or at participant request.
Diversion	Participant was referred for diversion support or program. (Not evaluation for an emergency detention)
Reviewed Plan w/Participant	Plan was reviewed by a facilitator with the participant, no changes were made.
Reviewed Plan w/Care Team	Plan was reviewed by a participant care team as part of plan engagement/use follow-up.
Reviewed and Updated Plan w/Participant	Facilitator reviewed and updated plan with the participant.
Contacted Personal Support/s in Plan	During or following use/engagement of plan, personal supports listed in plan were contacted.
Contacted Agency Support/s in Plan	During or following use/engagement of plan, agency supports listed in plan were contacted.
Updated Plan at Participant Request	Plan details were updated at participant request (address changes, support changes, etc.)
Canceled Plan at Participant Request	If the Participant requests that he/she no longer wants a Safety Plan in place.
Plan not Engaged	Plan was downloaded but not engaged, updated, or reviewed with participant. (Example, pulling up a plan in error or pulling a plan and not needing to engage the plan with a participant.)