CA:tCH Safety Plan Portal – Adding/Editing Participants

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. If you are adding a new Safety Plan, the plan must be saved somewhere on your computer system, so it can be uploaded to the site.

Navigating to the Participant Page

- Open the CA:tCH Safety Plan Portal, and log in
- Choose **Participants** from the **Quick Links** section, or from the left navigation tab.
- **To Add a New Participant**: Select New at the top-left of the Participant List
- **To View a Participant's Information and/or Plan**: Double-click on the Participant
- **To Edit a Participant's Information**: Select the Participant, and choose Edit at the top-left of the Participant List.

Adding a New Participant

- Complete all required fields, any additional fields, and set the **Plan Status** to Active.
- Upload a Safety Plan by selecting the **Attach file** link, and set the **Plan Effective Date**.
- Choose the **Save** button in the top right of the page to save the plan.
- Other tips:
    - When entering dates, you do not have to use the calendar icon, you can type the date into the box (using slashes / as separators)
    - If the Participant has a Guardian, one of the address fields must contain the Guardian's address and telephone number. The Relationship must be **Guardian**.
    - When selecting a **State** in an address section, first click into the box to open the drop-down list, then you can type a **W** to quickly get to the **WI** abbreviation.

Editing a Participant's Information

If you need to edit a Participant's information, or renew or cancel a Safety Plan:

- If you need to cancel a plan or renew a plan, change the **Plan Status** appropriately. **NOTE:** If you cancel a plan, the system will automatically add that action.
- If you are renewing or uploading a modified plan, first delete the old plan, upload the new plan, and change the **Effective Date**, if needed.
- Always Save your changes.
- Follow any changes by navigating to the **Actions** page and adding the appropriate **Action**.

Link to CA:tCH Portal:
https://wishin.sharepoint.com/sites/CAtCH

Need Help?

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