How to Clone a Document

What is Cloning?

Cloning in STAAND allows users to copy a document, re-date it or change the person to whom it applies and therefore create a new version without having to re-enter or cut and paste information. For example:

A Safety Plan should be updated if people or circumstances have changed. Instead of starting a new Safety Plan from scratch (and copying and pasting information from the old one), the Social Worker clones the active Safety Plan, changes the date and makes any other adjustments. Upon save, this becomes the new, active version of the Safety Plan.

A Youth Transition Plan (YTP) is updated over time to capture changes to a youth's circumstances, life objectives and action plans. Instead of starting a new YTP each time, the meeting scribe clones the active YTP, changes the date and makes any other updates. Upon save, this becomes the new, active version of the YTP.

Documents that can be cloned are:

- Complaints
- Family Roadmaps
- Family Time Plans
- Housing Plans
- PGRM records
- Safety Plans
- Youth Transition Plans

Documents that cannot be cloned:

- Case Plans
- Court Reports
- Placement requests (but these can be copied using the copy button on the form itself)

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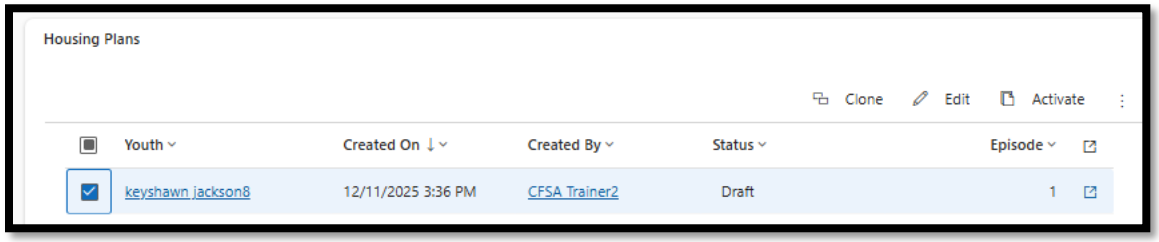
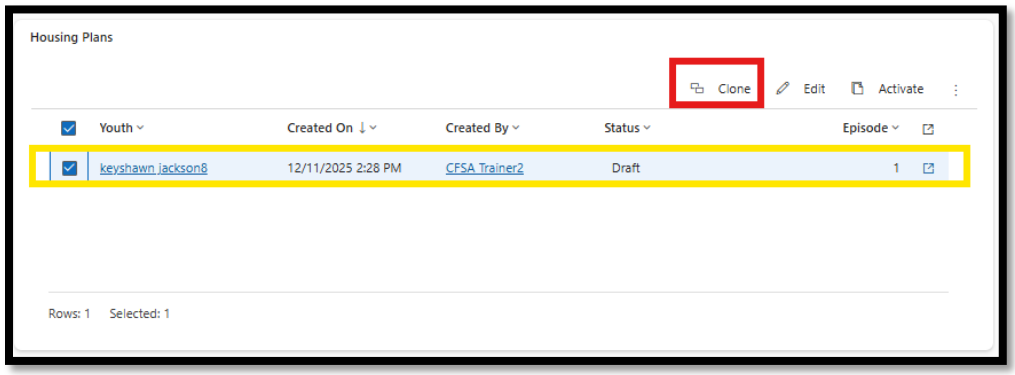
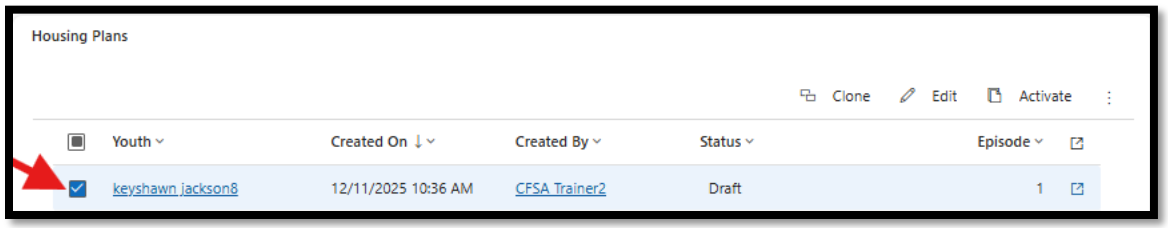
Step 1: In the document list, **check the box next to the most recent version**.



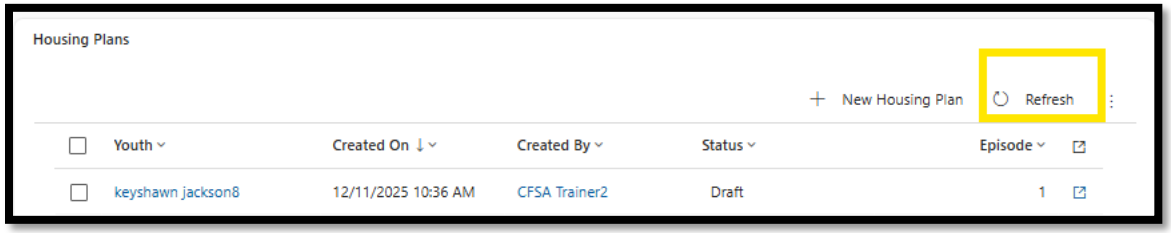
Step 2: Click the "**Clone**" button



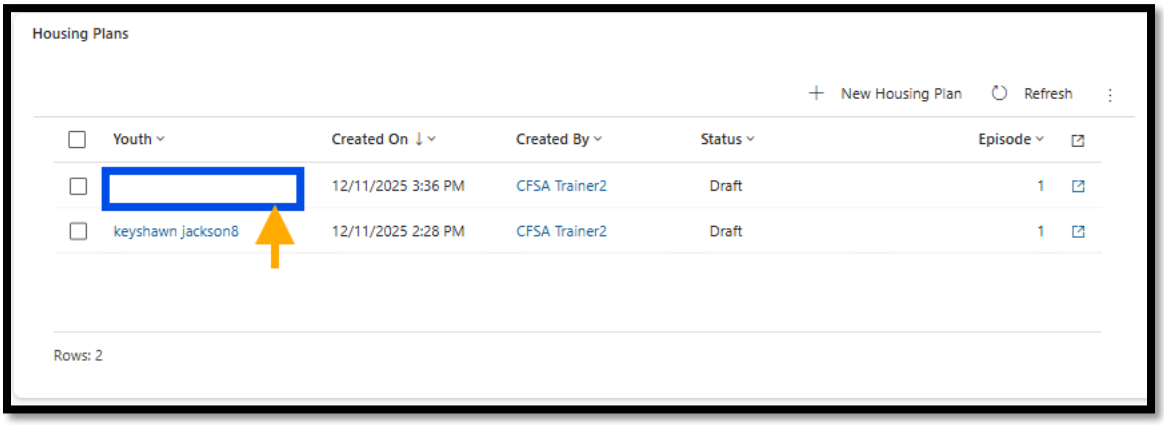
Step 3: Uncheck the box



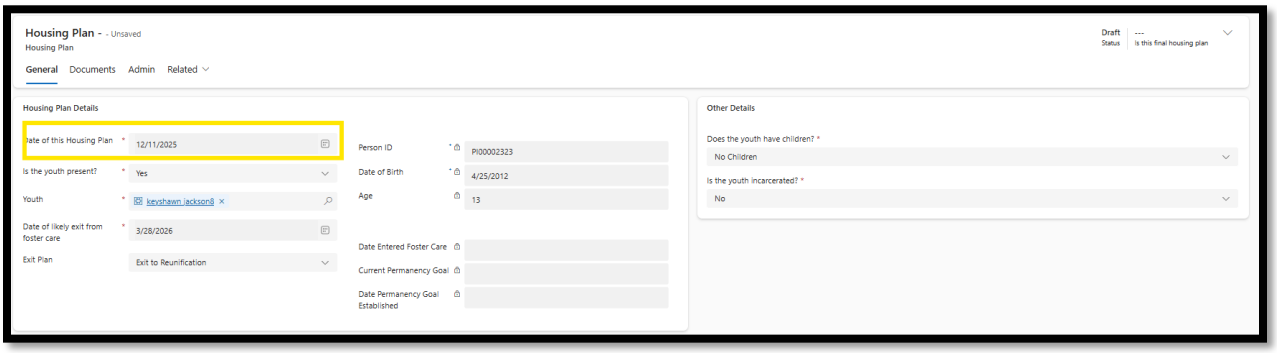
Step 4: Refresh the grid



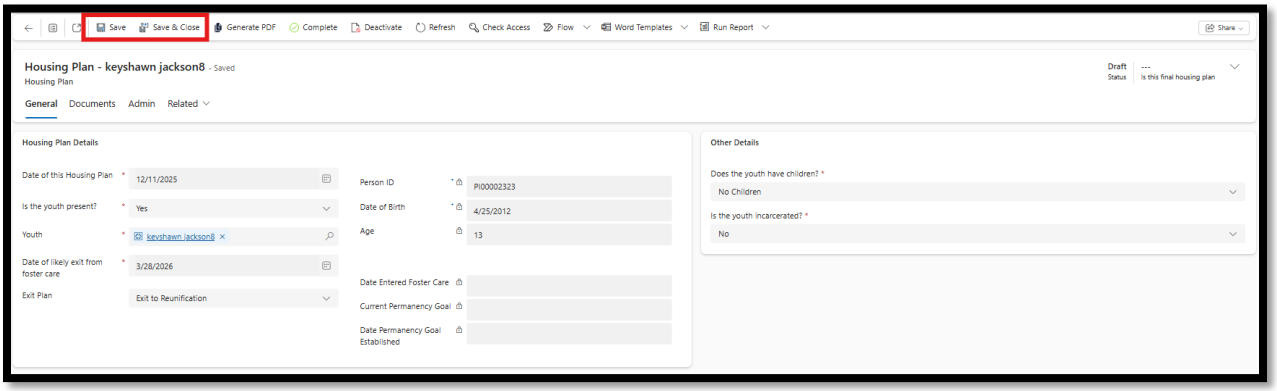
Step 5: Double click into the **newly created record** to open it.



Step 6: Enter the **new document date** (and any other identifying information that is required).



Step 7: Click **Save** and/or **Save & Close**.



For questions, call the STAAND Help Desk at 202-434-0009, or email them at cfsa.helpdesk@dc.gov.