ServicePoint - Case Plans
Quick Reference Guide

Creating a Goal through Case Plans

1	Access the client record in ClientPoint.
2	Click the **Case Plans** tab.
3	Click **Add Goal**.
4	Click the checkbox next to household members if the goal also applies to them.
5	In the *Provider* field, select a provider.
6	The *Date Goal Was Set* field defaults to today's date.
7	In the *Goal Classification/Type* field, select a classification for the goal from the first dropdown list. Select the goal type from the second dropdown list. Both fields are required.
8	In the *Target Date* field, enter a projected date to achieve the goal.
9	In the *Overall Status* field, select *In Progress* as the status. This is a required field.
10	In the *Projected Followup Date* field, enter the projected date that you will follow-up with your client. This date will be viewable on the ServicePoint Home Page.
11	Click **Save Changes**. Then scroll down to Add Case Notes.

Adding Case Notes

1	Click **Add Case Note**.
2	When the Case Notes Data window displays, select the appropriate Provider from the dropdown list.
3	The *Note Date* field defaults to today's date.
5	Enter the note in the *Notes* box. A note can be up to 4,000 characters in length.
6	Click **Save** when finished. This is a non-editable field after it has been saved.
7	Scroll down to Add Action Step.

Adding Action Steps

Action Steps are individual items that aid in reaching the chosen goal. They are a way to ensure progress on a goal, and serve as a helpful reminder to follow-up with the client.	
1	Click **Add Action Step.**
2	In the *Provider* field, select the same provider associated with the Goal.
3	The *Date Action Step was Set* field defaults to today's date.
4	In the *Action Step* field, enter a description of the action to be taken.
5	In the *Target Date* field, enter a date that the action is to be completed.
6	In the *Overall Status* field, select *In Progress* as the status. This is a required field.
7	In the *Projected Followup Date* field, enter a date to follow-up with client. This date will be viewable on the ServicePoint Home Page.
8	Click **Add Action Step**.
9	Click **Save Changes**.
If adding action steps when entering the goal, follow the steps above. If entering action steps at a later time, access the client record, click the Case Plans tab, click the edit icon beside the Goal, scroll down to the Action Step section, and follow steps 1 through 9.	

Printing a Case Plan

1	Click the **Case Plans** tab.
2	Click the edit icon beside the Goal to be printed
	Click the **Printer** icon located next to *Case Plans – Edit Goal*. The print-ready Case Plan screen will display.
3	Click **Print This Document**.
4	Click **Print**. Close the window.

Updating (Following-Up) Goals or Action Steps

	To Update a Goal:	To Update an Action Step:
1	Click the **Goal** follow-up reminder from the Home Page. The Case Plan – Edit Goal screen will display.	Click the **Action Step** follow-up reminder from the Home Page. The Case Plan – Edit Goal screen will display. Click the **Edit Icon** next to the Action Step.
2	In the *Overall Status* field, select the appropriate Status.	
3	In the *If Closed Outcome* field, select the appropriate option and enter a date for the outcome.	
4	In the *Actual Followup Date* field, enter the date you followed up with the client about the goal (action step).	
5	In the *Followup Made* field, select Yes or No. (This cleans up the follow up on the Home Page)	
6	In the *Outcome at Followup* field, select an outcome.	
7	Click **Save Changes.**	Click **Save Action Step**.
NOTE: Goals should not be deleted unless entered incorrectly. Deletion of goals also deletes case notes and action steps.