

CASE PLANS

Case Plans is a tool available to users that allow adding goals, action steps and even servicing transactions as necessary. To add a case plan, do the following:

- » Click Case Plans Tab (1)
- » Select household members for which this case plan applies to (2)
- » Select Case Manager
- » Select Classification
- » Select Type (Type will be dependent on the Classification picked)
- » Select Overall Status
- » Create Follow-up as necessary
- » Click Add Goal

The screenshot displays the 'Goal - (28) Screen, Xavvia' form. The form is divided into several sections:

- Household Members:** A list of household members with checkboxes. (28) Screen, Xavvia is selected. (29) Screen, Frankie and (30) Screen, Xavvitta are not selected.
- Provider:** HCCH-PSH Service Support (824)
- Case Manager:** -Select-
- Date Goal was Set:** 09 / 01 / 2016
- Classification:** Income
- Type:** Applied to SOAR
- Goal Description:** (Empty text area)
- Target Date:** (Empty date field)
- Overall Status:** In Progress
- If Closed, Outcome:** -Select-
- If Partially Complete, Percent Complete:** -Select-
- Projected Follow Up Date:** (Empty date field)
- Follow Up User:** HCCH-PSH Service Support (824)
- Follow Up Made:** -Select-
- Completed Follow Up Date:** (Empty date field)
- Outcome at Follow Up:** -Select-

Numbered callouts (1-7) indicate the steps for adding a goal: 1. Case Plans tab, 2. Add Goal button, 3. Household members selection, 4. Classification dropdown, 5. Type dropdown, 6. Overall Status dropdown, 7. Add Goal button.

Figure 1

- » The screen will expand to display Case Notes, Action Steps and Service Items for this goal.
- » Click Add Case Note. Each time a goal is revisited, a user can create a new case note. Each case note will be stamped with the appropriate date.

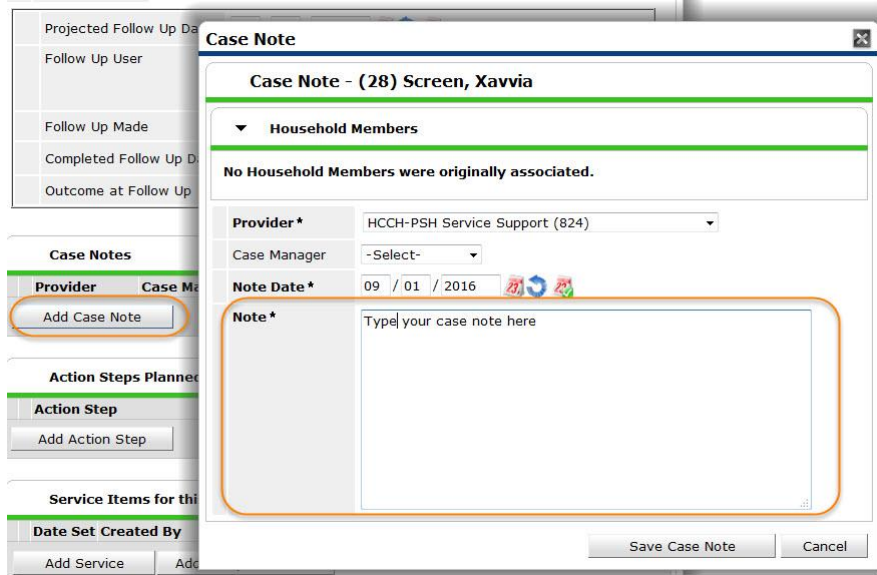


Figure 2

- » Click Add Action Step. This will allow a user to add specific action steps that the client must take in order to reach their goal.(1)
- » Add Action Step (2)
- » Select Overall Status (3)
- » Create Follow-Up as necessary (4)
- » Save Action Step

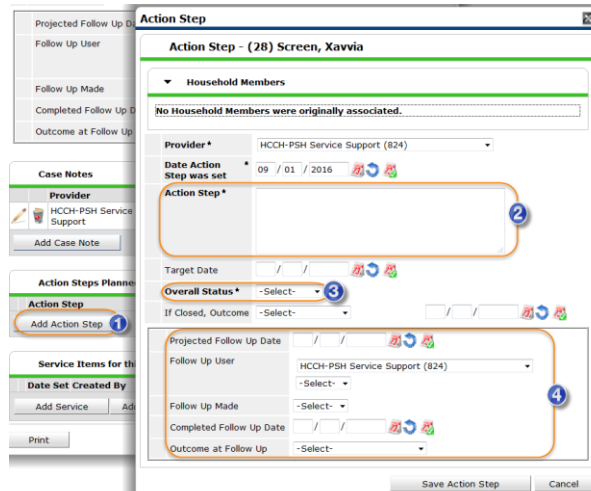


Figure 3