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# ServicePoint™

## version 5.7

# Case Plans Workflow

Collaborate. Coordinate. Evaluate.

Connecting Communities > Demonstrating Outcomes™

Collaborate. Coordinate. Evaluate.

# Case Plans!

The *Case Plans* portion of ClientPoint allows case managers to assign and track case managers assigned to clients, establish goals and action steps to reach that goal. Service Transactions related to achieving goals can be entered directly in Case Plans. This feature allows case managers and program evaluators to show goals achieved or not achieved, the action steps taken and the services provided to get client(s) to achieve success through case management.

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# Learning Objectives

**After reviewing this presentation, you will understand how to:**

- **Login to ServicePoint®**
- **Navigate to Client Profile**
  - **Add Client Notes**
  - **Upload File Attachments**
- **Navigate to *Case Manager s***
  - **Enter Case Managers**
- **Navigate to *Case Plans***
  - **Enter Goal Classifications and Types**
  - **Enter Action Steps**
  - **Enter Case Notes**
  - **Enter Service Transactions**
  - **Print Case Plans and Case Notes**
  - **Upload File Attachments**

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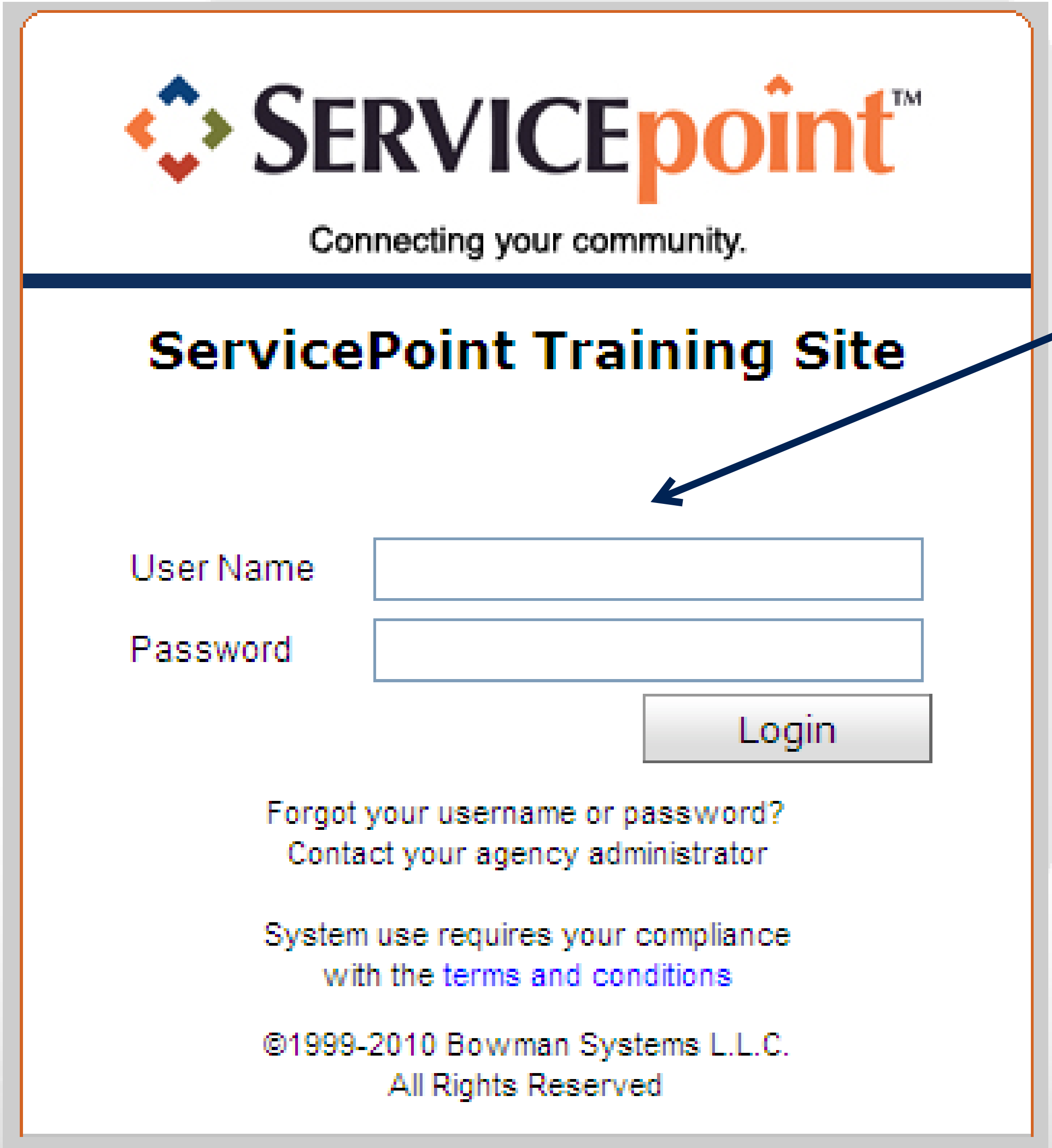
# ServicePoint v5.3




Begin by logging into *ServicePoint®* using your assigned Username & Password.

Contact your Agency or System Administrator if you need assistance in gaining access to *ServicePoint®*.

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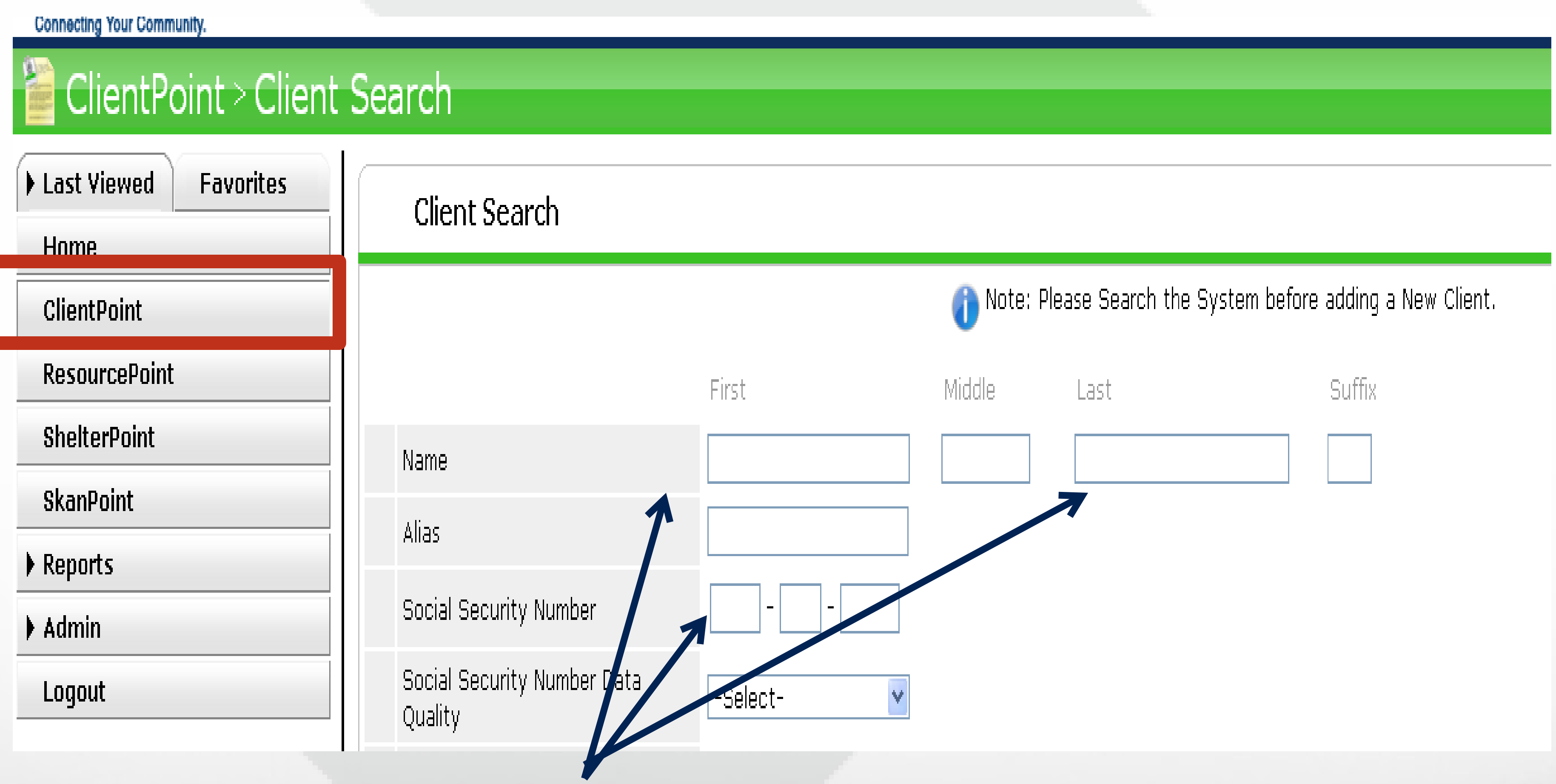
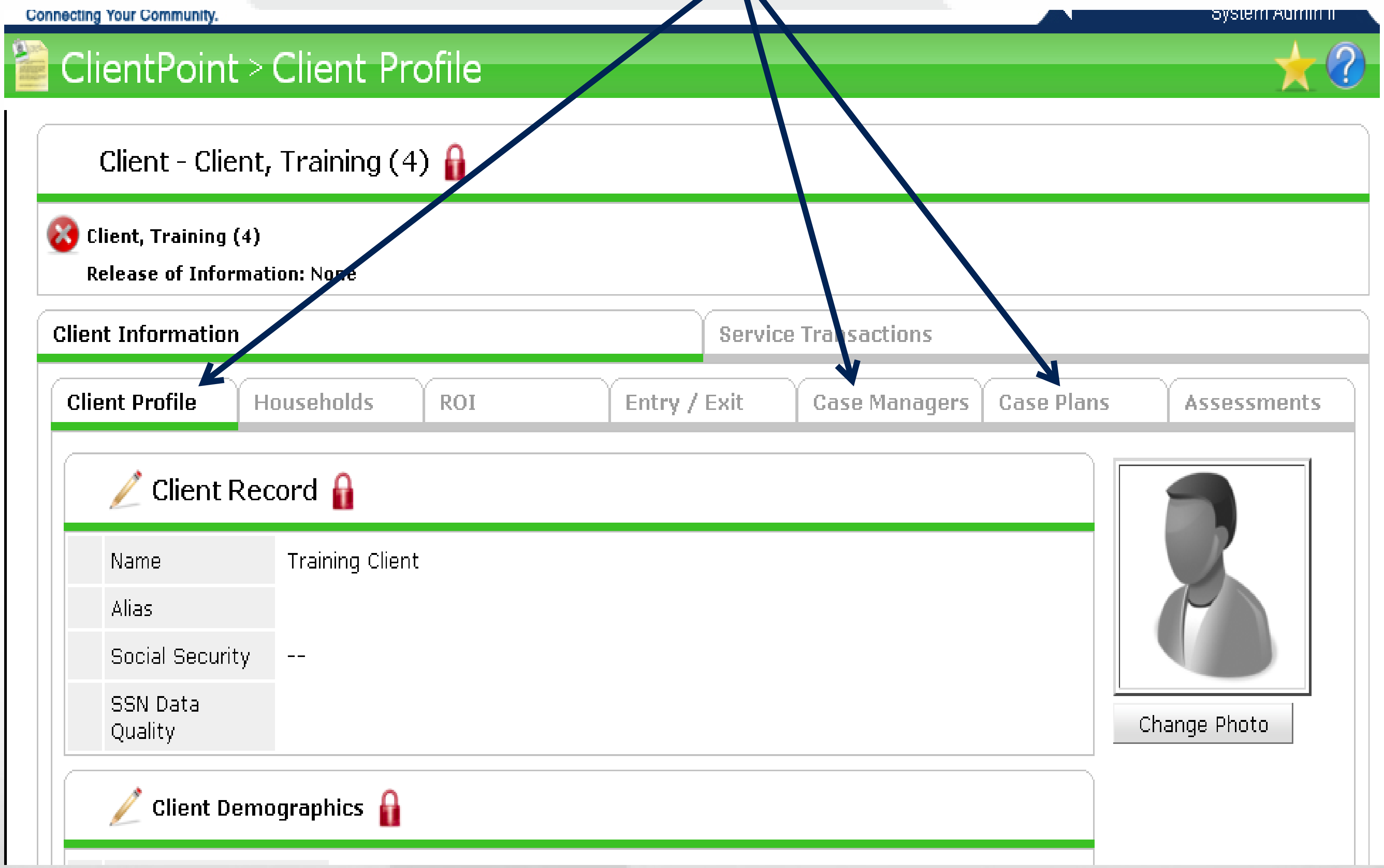
# ClientPoint
# “The filing cabinet!”




Search for existing clients, or add clients

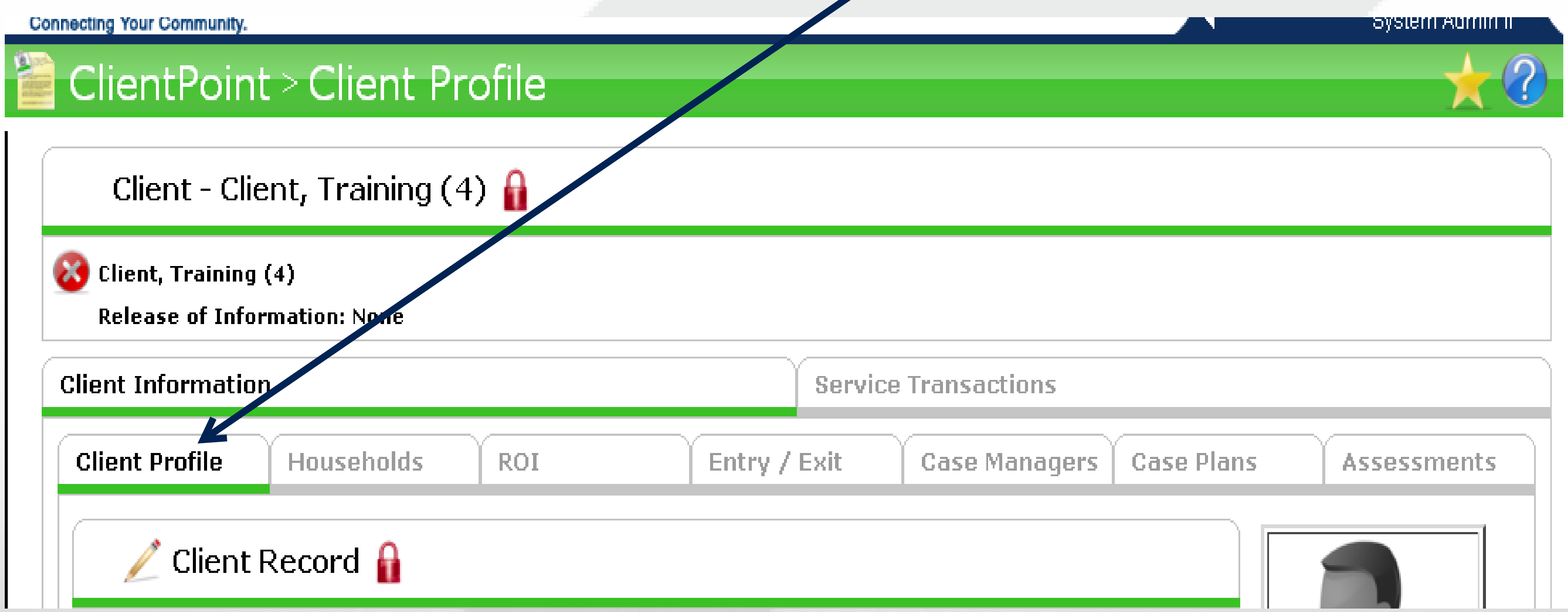
# "Client Information Tab"

## The Client Profile, Case Managers, and Case Plans tabs may be used for case management.



# Add Client Notes

Client Notes are quick Case Notes that can be entered for clients without having to enter a Goal Classification in the Case Plan section of ClientPoint. To use this feature navigate to the Client Profile.



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# Client Notes

On the Client Profile screen scroll down the page until the section labeled “Client Notes” is reached. Click on the “Add New Client Note” button.

**Client Notes**

| | | Provider | Note Date | Note Preview | Full Note |
|---|---|---|---|---|---|
| | | Bowman Systems, LLC | 05/01/2011 | This is a test | |

Add New Client Note | Print | **Showing 1-1 of 1**

**File Attachments**

| | | Date Added | Name | Description | Type | Provider | Added From | |
|---|---|---|---|---|---|---|---|---|
| | | 03/29/2012 | ServicePoint Technical Specifications.pdf | | pdf | Bowman Systems, LLC | Entry/Exit | |

Add New File Attachment | **Showing 1-1 of 1**

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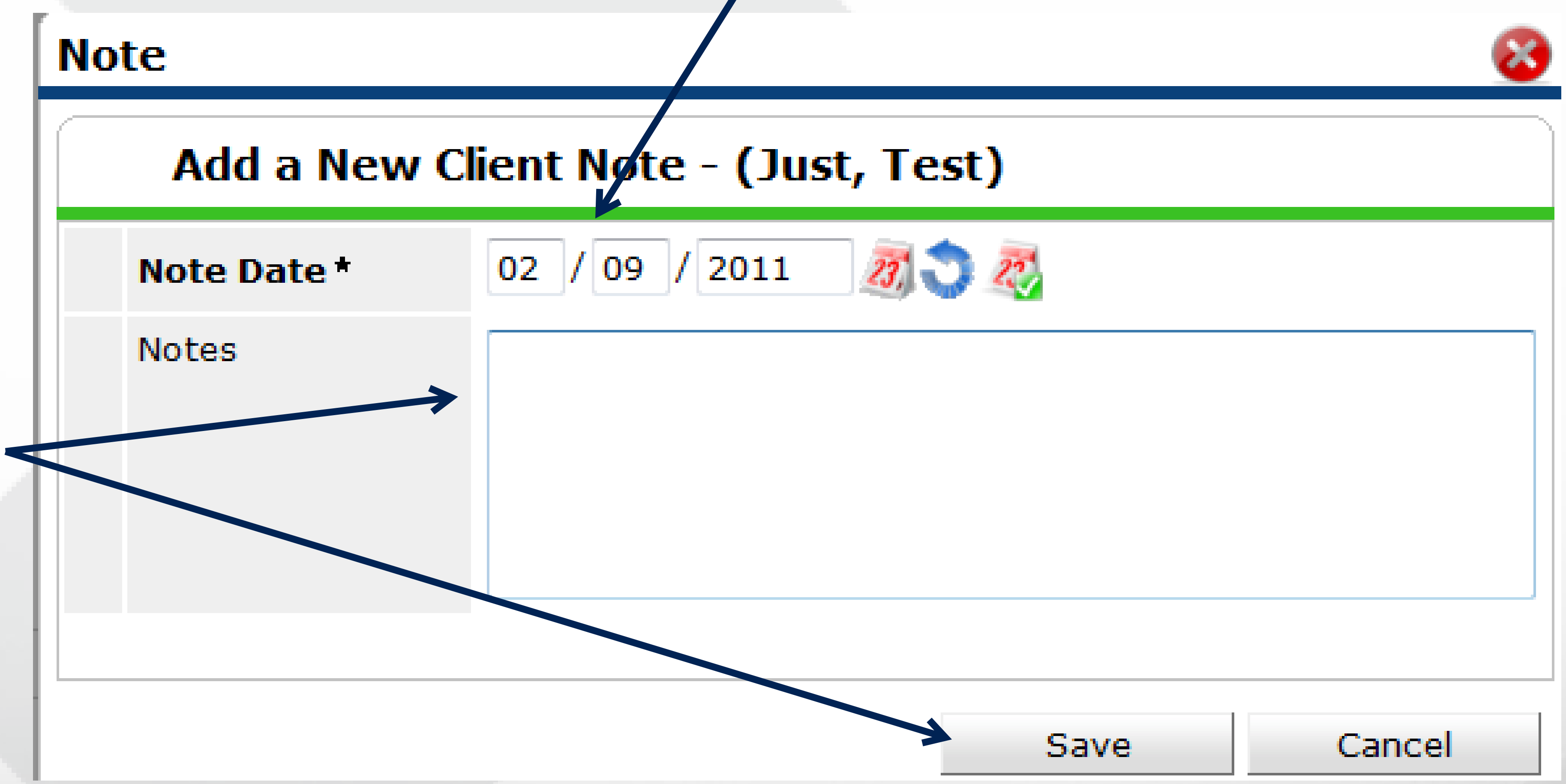
## Client Notes

The Client Note data entry screen will pop up. Enter the date of the note by typing in the date or using the calendar options to the right of the question. The Note Date is a required field.




Next type the note in the Notes field. Once the note is finished click on the “Save” button.

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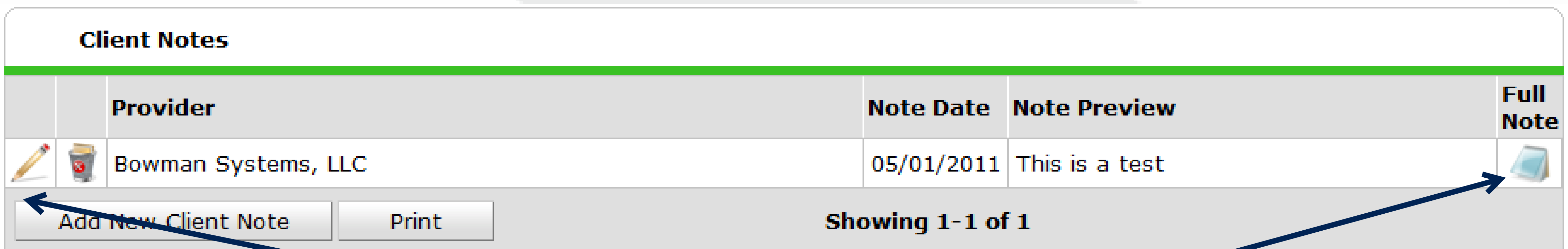
## Client Notes

After the note has been entered and saved a history and preview of notes will start appearing.



**Client Notes**

| | | Provider | Note Date | Note Preview | Full Note |
|---|---|---|---|---|---|
| | | Bowman Systems, LLC | 05/01/2011 | This is a test | |

Add New Client Note | Print | **Showing 1-1 of 1**

To edit or view notes click on the pencil of the “Full Note” Icon.

# Client Notes

To delete notes click on the Trash Can delete icon.

**Client Notes**

| | | Provider | Note Date | Note Preview | Full Note |
|---|---|---|---|---|---|
| | | Bowman Systems, LLC | 05/01/2011 | This is a test | |

Add New Client Note | Print | **Showing 1-1 of 1**

Notes can be printed by selecting the "Print" button. Select the time frame and Provider(s) you want to print case notes for.

**Client Notes Print Options**

| | | |
|---|---|---|
| | Include Client Notes | All / Date Range |
| | Client Note Providers | All / My Provider Only |

Print | Cancel

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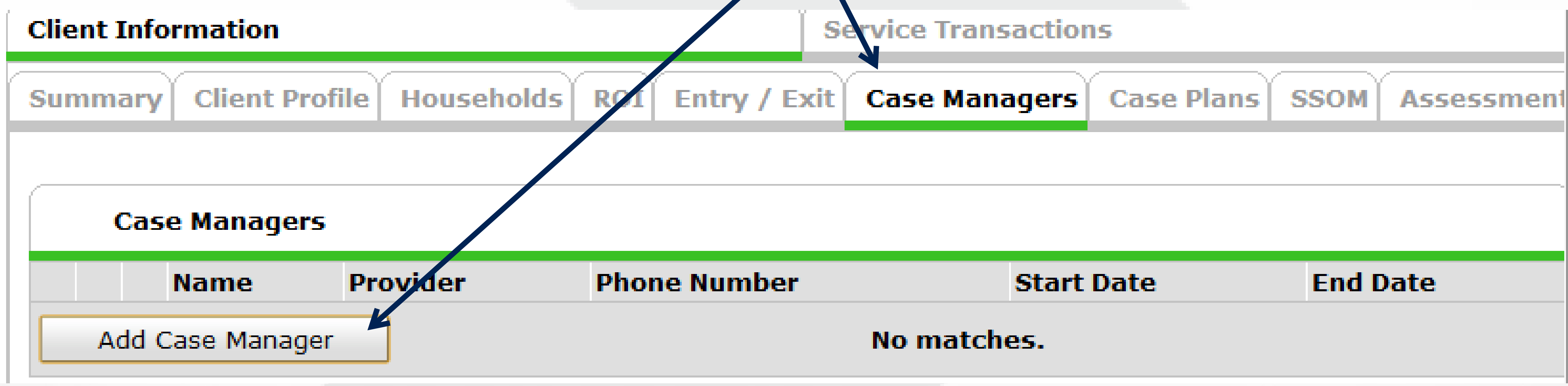
Case Managers

# Case Managers

Case Managers section will allow End Users to assign Case Managers to clients. To enter a Case Manager click on the "Case Managers" tab followed by the "Add Case Manager" button.




**NOTE: If end users need to assign a specific Case Manager to a case plan the "Case Manager" must be entered before moving to Case Plans.**

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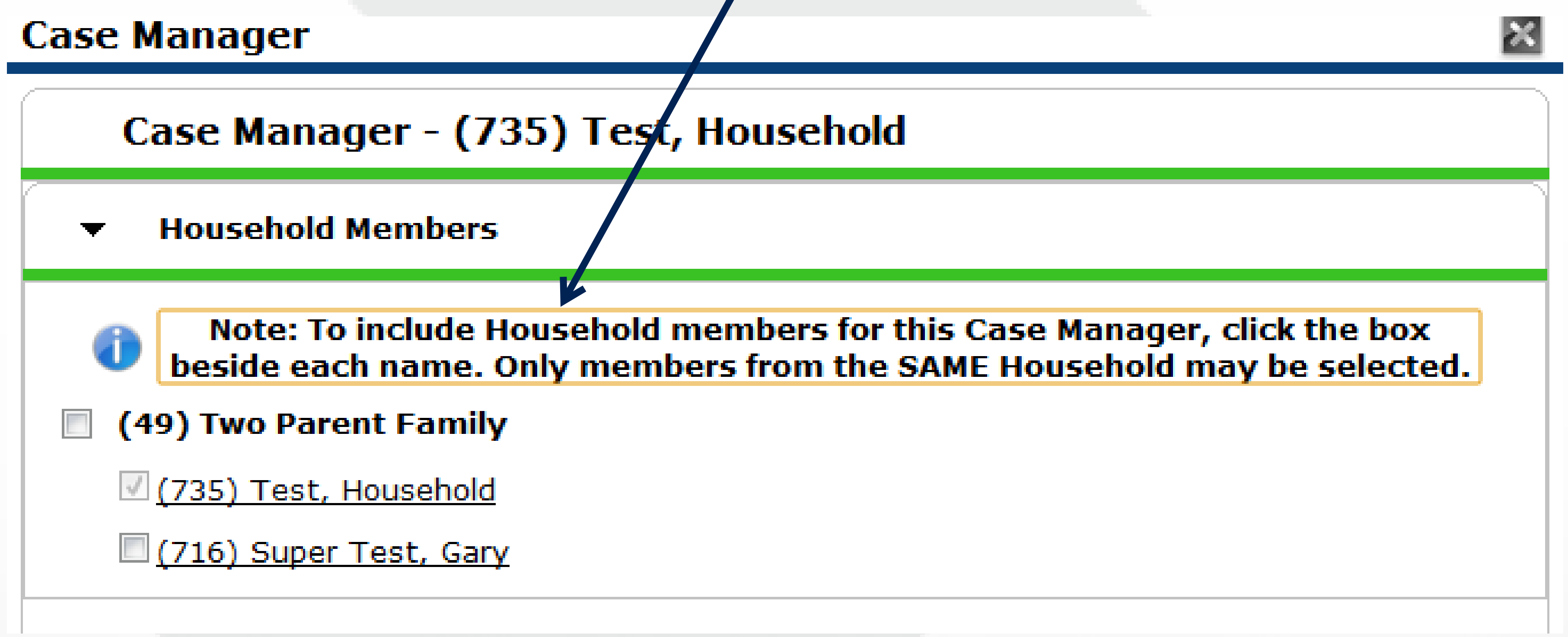
## Case Managers

The Case Manager window will pop up. First select Household Members that the Case Manager will also be working with.



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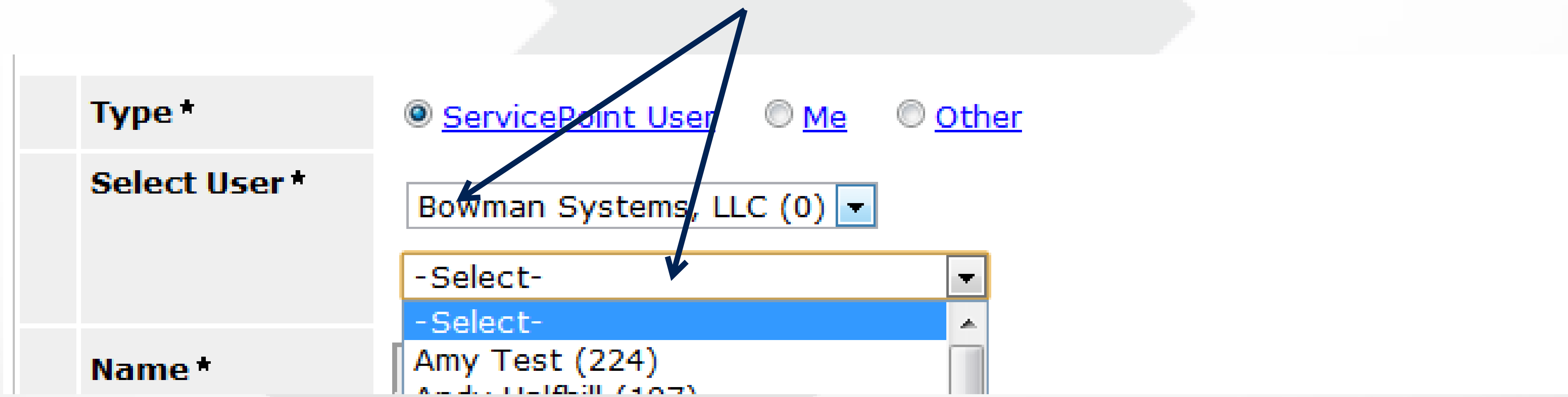
# Case Managers

The first method is to select a case manager from a specific provider. First a provider will need to be selected from the Provider Drop list. After the Provider is selected then the Case Manager can be selected from the drop down list.



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# Case Managers

Another option is for the End User to select "Me" as the Case Manager which will populate the fields with their information.

| | |
|---|---|
| Type* | ○ ServicePoint User ◉ Me ○ Other |
| Name* | New User |
| Title | |
| Phone Number | |
| Email Address | |

The final option is to select "Other" which gives the End User the ability to track case managers that are or are not affiliated with agencies using ServicePoint. The End User will type in the Case Manager Information.

| | |
|---|---|
| Type* | ○ ServicePoint User ○ Me ◉ Other |
| Name* | Type In Name Here |
| Title | |

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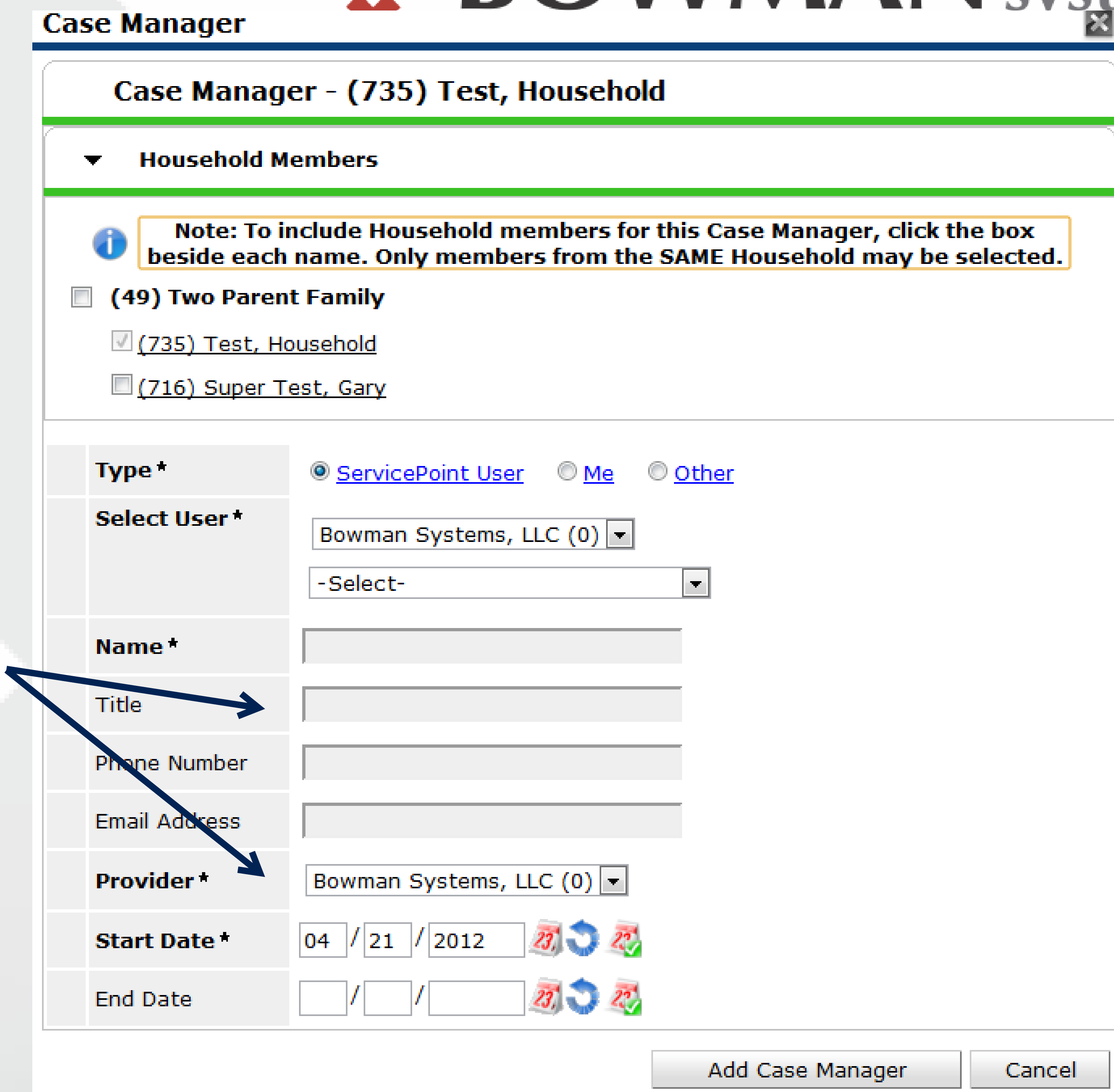
## Case Managers

Other options that can be entered are the Case Managers' Title, Phone Number, and Email Address. The provider, a required field, will default to the end users' provider but may be changed to another Provider the End User has EDA access to.




Start Date is also a required field. The Start Date and End Date will indicate the time frame this case manager is active for this client.

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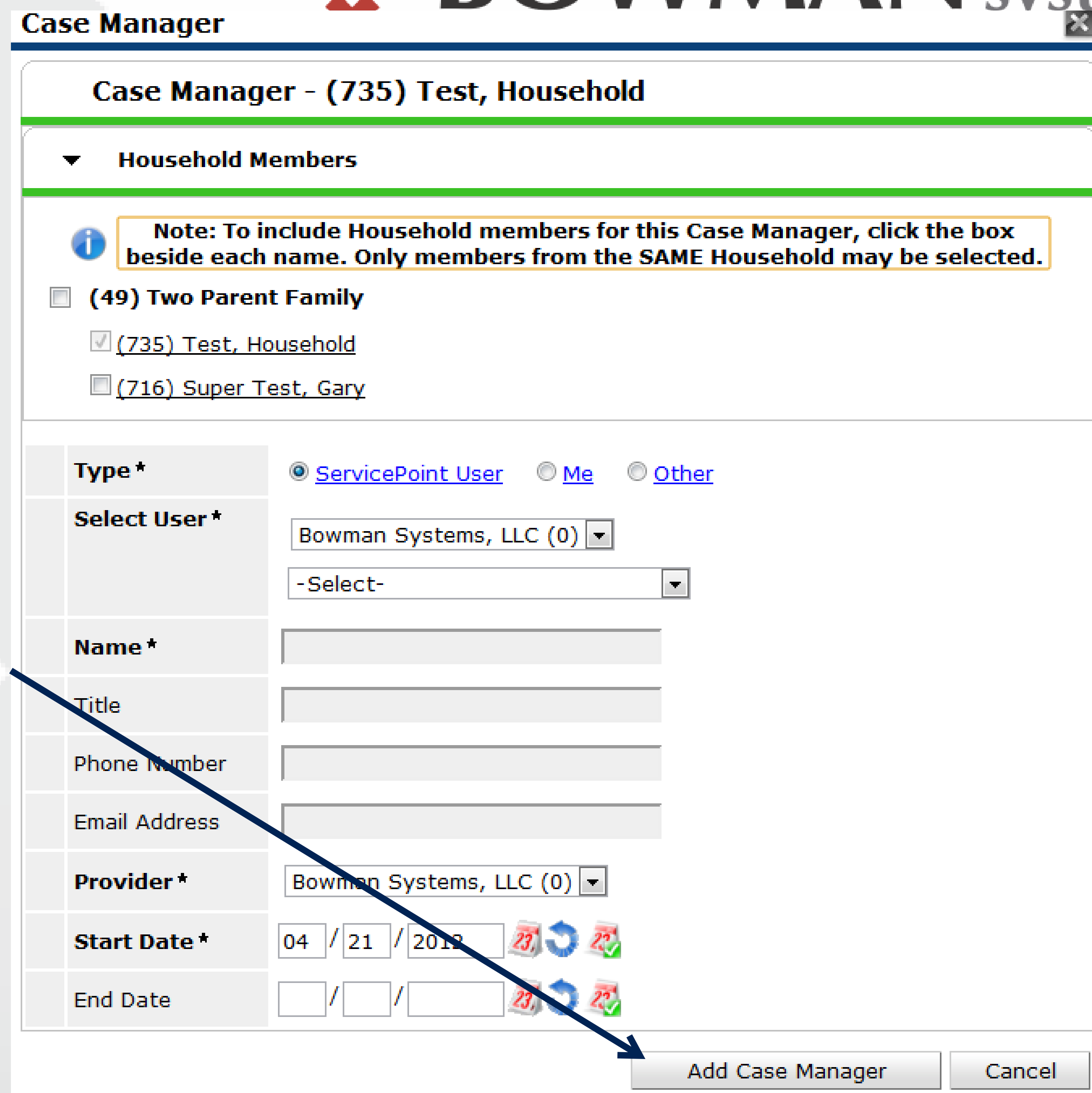
## Case Managers

Once all fields answered for the Case Manager click on the “Add Case Manager” button to save this case manager’s information.



# Case Managers

After the Case Manager information has been saved a history and preview of Case Managers will start appearing.

**Case Managers**

| | | | Name | Provider | Phone Number | Start Date | End Date |
|---|---|---|---|---|---|---|---|
| | | | New User | Bowman Systems, LLC | | 04/21/2012 | |

Add Case Manager

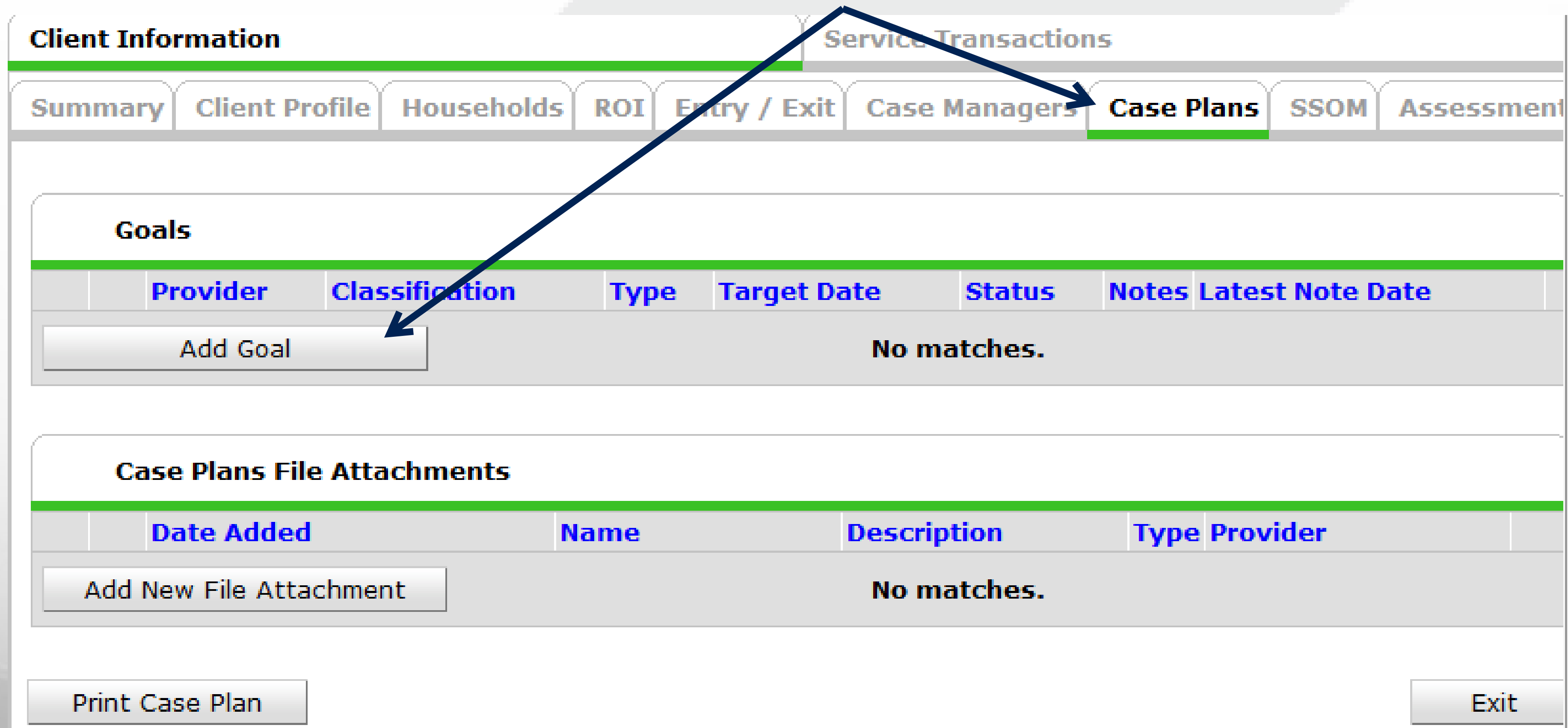
**Showing 1-1 of 1**

To edit case manager information click on the pencil.
To delete case manager click on the trash can icon.

Goal Classification & Type

# Goal Classification and Types

The next step in Case Management is to start developing a Case Plan. In this section Goal Classification, Action Steps, Case Notes, and related Service Transactions can be added. To start this process click on the “Case Plans” tab and then the “Add Goal” button.

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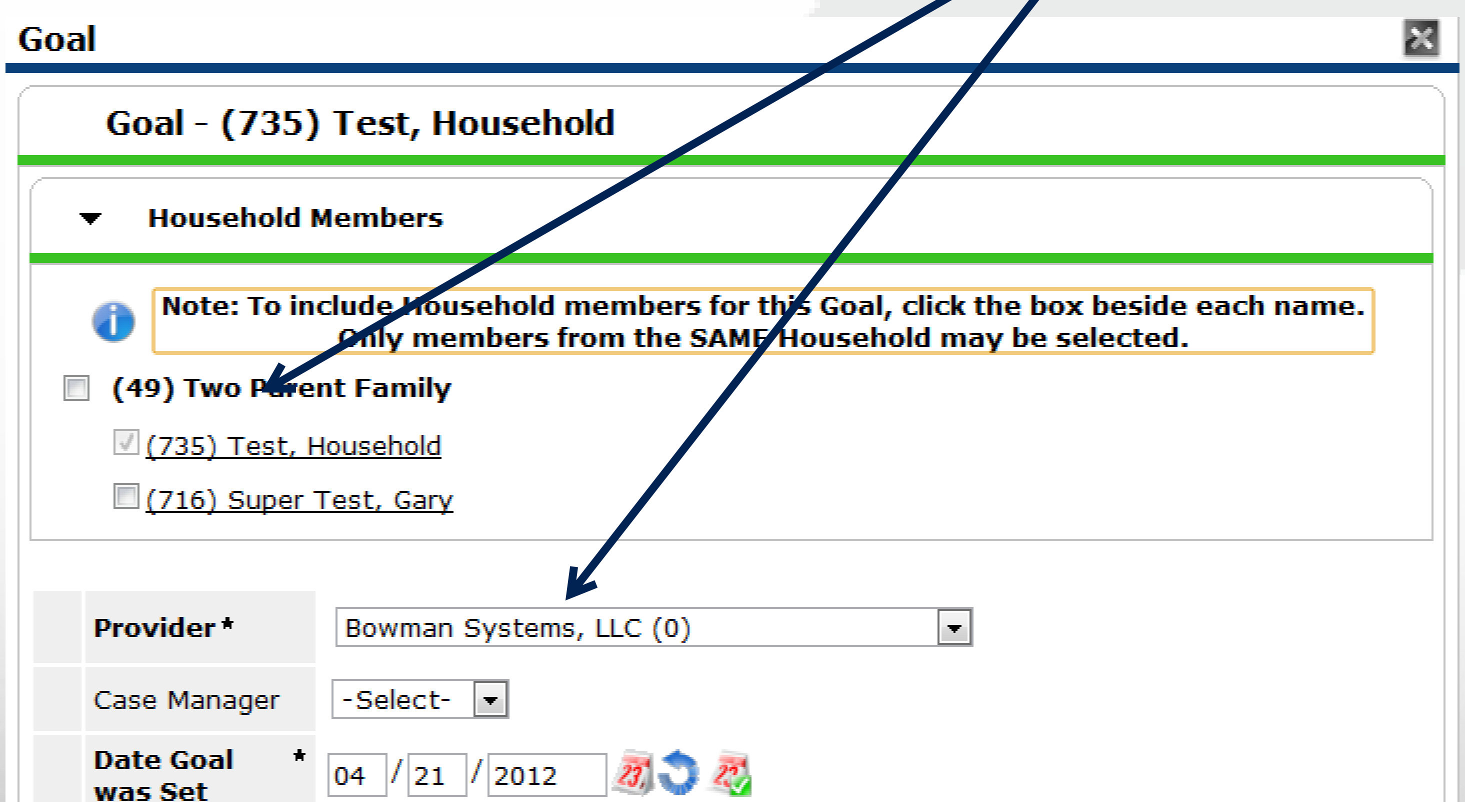
## Goal Classification & Type

In the pop up window, first select the Household Members associated with the goal. The Provider will default to the end users' EDA provider. This can be changed by selecting from the drop down list for a new provider.



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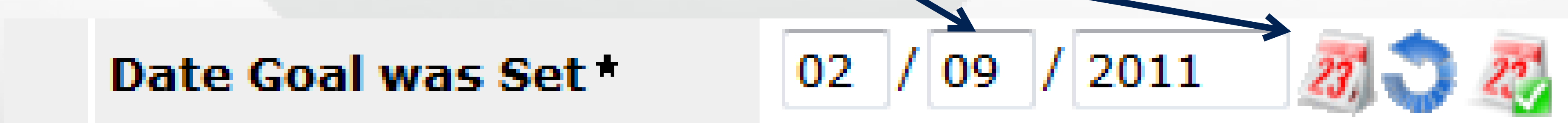
# Goal Classification & Type

Select a Case Manager to assign to this goal from the Case Manager drop down list. This list is populated from the “Case Managers” tab that was populated earlier.


Next enter the “Date Goal was Set”. This can be typed in or entered by using the calendar functions in ServicePoint.



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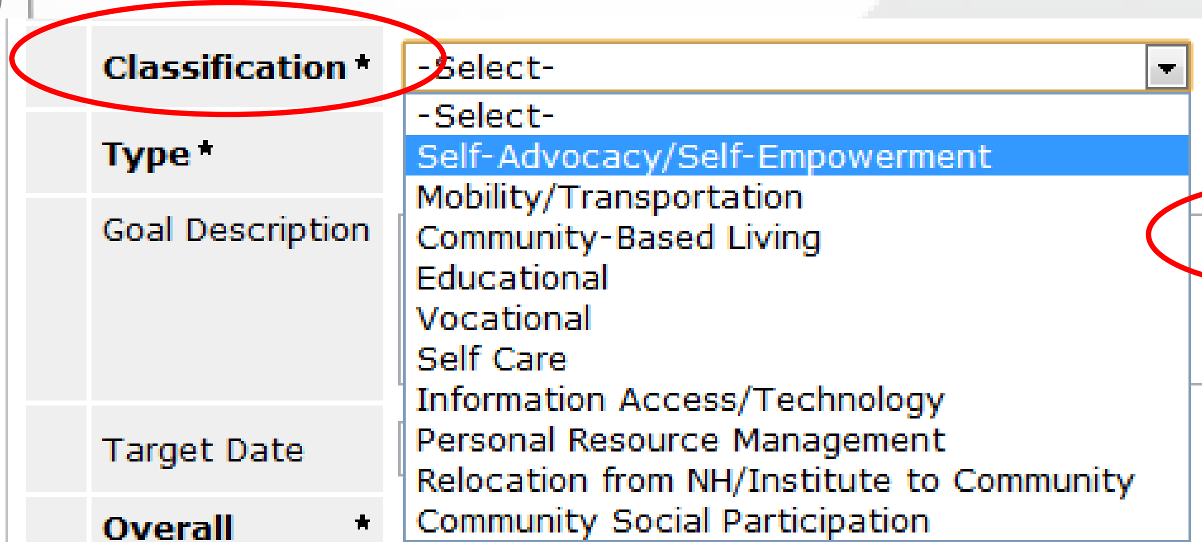
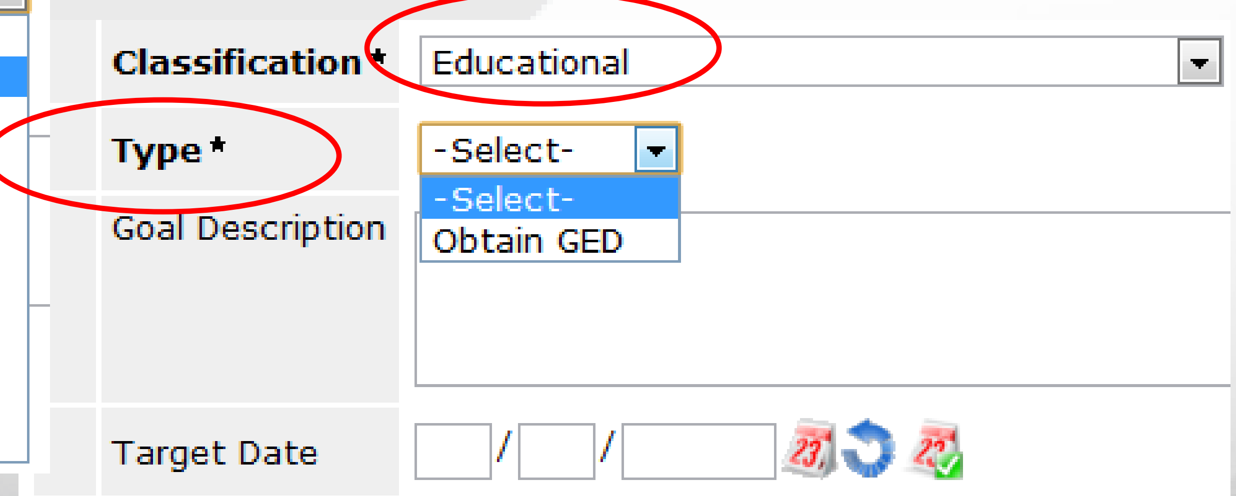
# Goal Classification & Type

The next two questions are Goal Classification and Goal Type. The Goal Type dropdown is dependant on which category is selected from Goal Classification. For instance, you would get one set of answers for Type by selecting the Classification of Education and another set of answers if the Classification of Employment is selected.



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# Goal Classification & Type

Next fill in the Goal Description if it is needed. This can be used to better explain the Goal Classification and Type with specifically what the Client is wanting with that goal.

| | |
|---|---|
| Goal Description | |
| Target Date | / / |
| **Overall Status** * | -Select- |
| If Closed, Outcome | -Select- / / |
| If Partially Complete, Percent Complete | -Select- |

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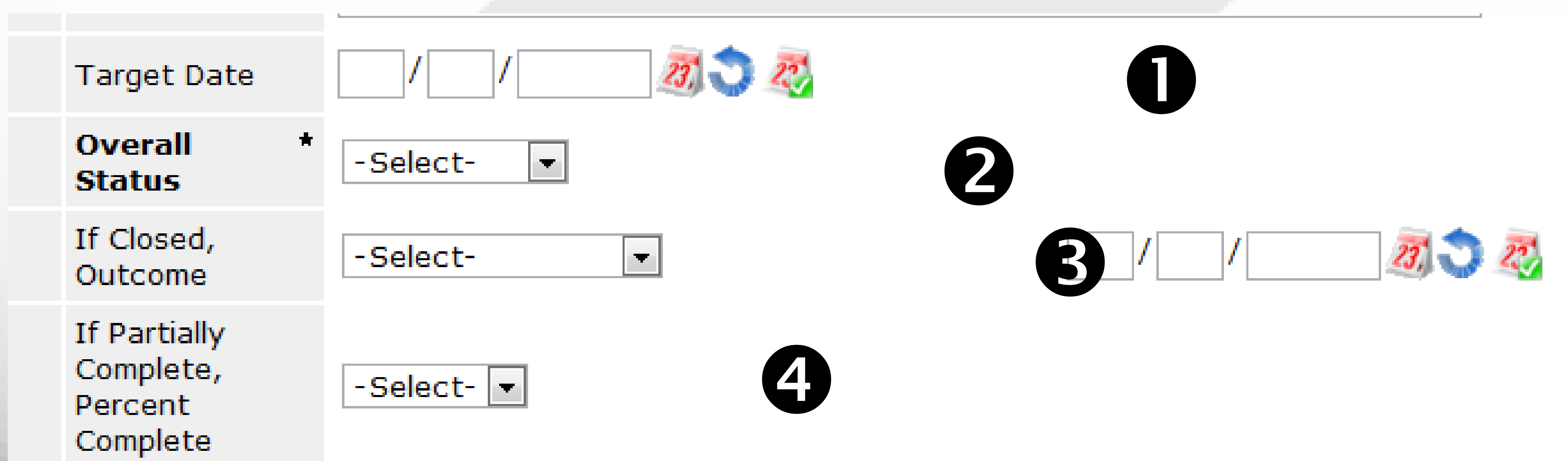
## Goal Classification & Type

Fill in the "Target Date" by typing in the date or using the calendar features. This is the date that is targeted for goal completion (1). Select the "Overall Status" of the goal, this is a required field (2). If the "Overall Status" is closed then answer the "If Closed, Outcome" drop down list and to the right of that fill in the date the goal was closed (3). Finally if the goal is only partially completed select the percentage complete from the "If Partially Complete, Percent Complete" drop down list (4).



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## Goal Classification & Type

If needed a Follow Up Date can be entered to provide a reminder for end users. To utilize this function enter the "Projected Follow Up Date". The Follow Up User can be selected from the drop down list or the end user can change to another provider they have EDA access too for more options.

| | |
|---|---|
| Projected Follow Up Date | / / |
| Follow Up User | Bowman Systems, LLC (0)<br>-Select- |
| Follow Up Made | -Select- |
| Completed Follow Up Date | / / |
| Outcome at Follow Up | -Select- |

# Goal Classification & Type

The last three questions in the follow up section are only filed in once the follow up has been made. This will remove the follow up from the "Follow Up List" on your home screen.

| | |
|---|---|
| Projected Follow Up Date | 04 / 15 / 2011 |
| Follow Up User | Professional Services Training Provider (1) Search My Provider Clear<br>case manager |
| Follow Up Made | -Select- |
| Completed Follow Up Date | / / |
| Outcome at Follow Up | -Select- |

# Goal Classification & Type

On the home screen, or when an end user logs into ServicePoint, the "Follow Up List" box will now start to populate with items. By clicking on the client id it will take the end user directly to that client. If the "Type" field is clicked on it will take the end user directly to the goal that needs to be followed up on.

**Follow Up List**

| Client ID | Type | Date | Time Remaining |
| --- | --- | --- | --- |
| 1 | Goal | 04/15/2011 | 64 Days |
| 2 | Goal | 04/15/2011 | 64 Days |

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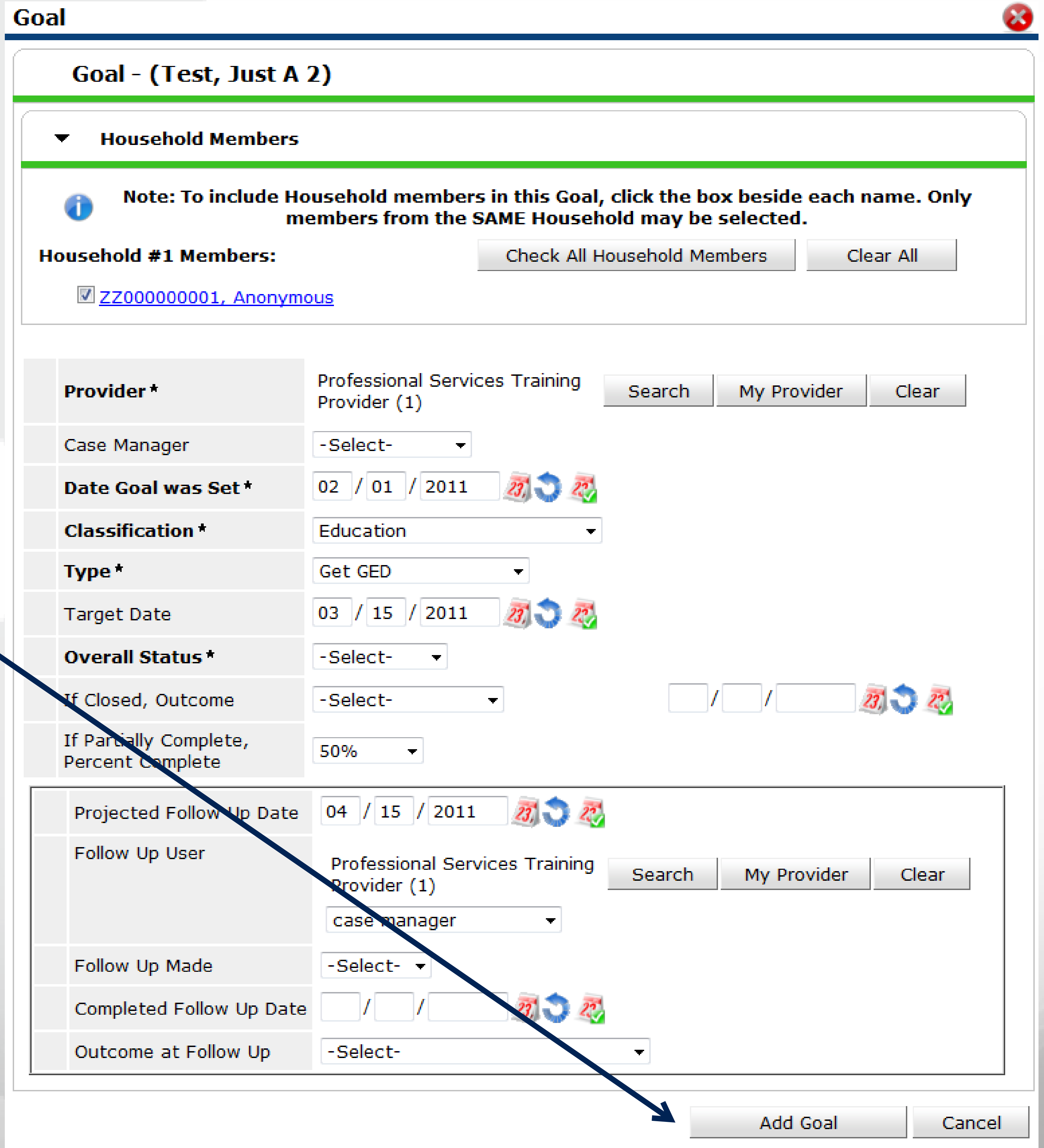
# Goal Classification & Type

The final step is to click on the “Add Goal” button. This will add the goal and give the end user the ability to add Case Notes, Actions Steps, and Services related to this goal.



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# Goal Classification & Type

The additional options for Case Planning will appear after the "Add Goal" button has been pushed.

**Case Notes**

| | Provider | Case Manager | User | Note Date | Note |
|---|---|---|---|---|---|
| | Add Case Note | | No matches. | | |

**Action Steps Planned**

| | Action Step | Target Date | Status | Outcome |
|---|---|---|---|---|
| | Add Action Step | No matches. | | |

**Service Items for this Goal**

| | Date Set | Created By | Need Type | Status | Outcome |
|---|---|---|---|---|---|
| | Add Service | | No matches. | | |

Print | Save Goal | Save & Exit | Exit

Case Notes

# Add Case Notes

Add Case Notes allows case managers to document the contact and visits with clients during their time in case management. To add case notes click on the "Add Case Note" button.

***NOTE: Depending on how your implementation is set up, you may or may not be able to delete or change case notes after they are saved. Please contact you System Administrator for more information.***

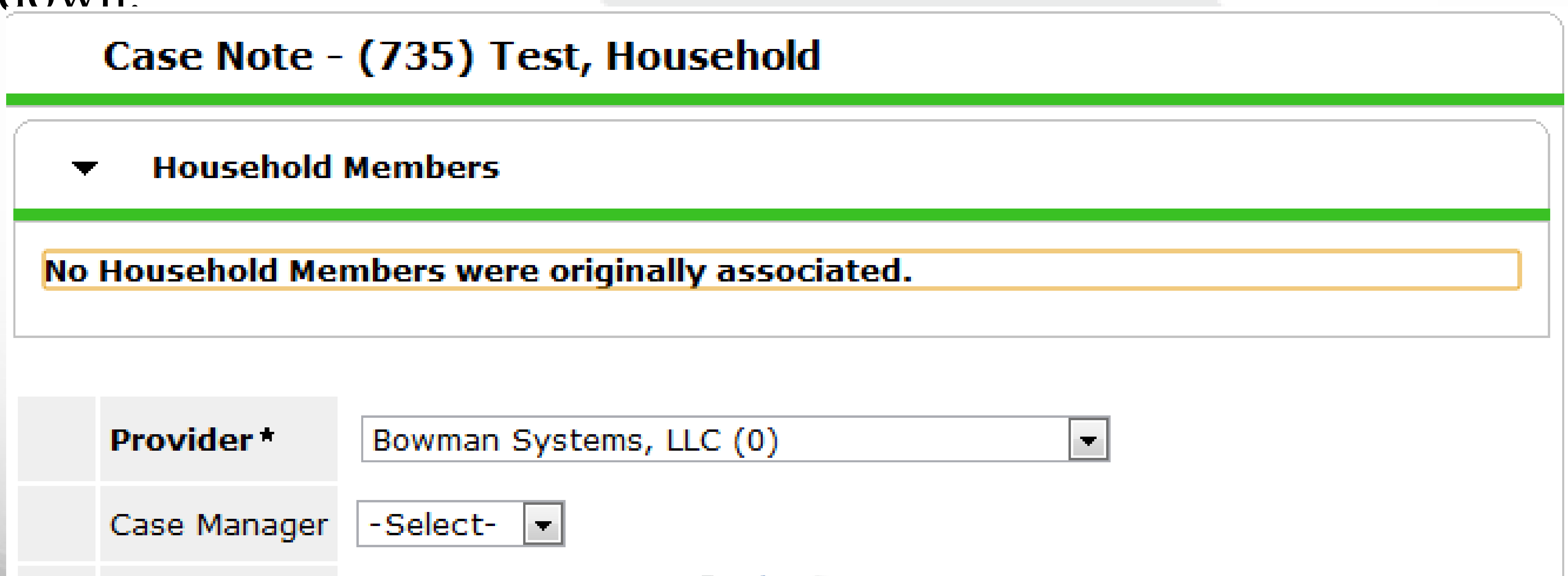
**Case Notes**

| | Provider | Case Manager | User | Note Date | Note |
|---|---|---|---|---|---|
| Add Case Note | | | No matches. | | |

Collaborate. Coordinate. Evaluate.

# Case Notes

Select associated Household members if required then select the case manager associated with this case note or select a different provider from the Provider list. After the provider is selected, assign the appropriate case manager from the “Case Manager” drop down.



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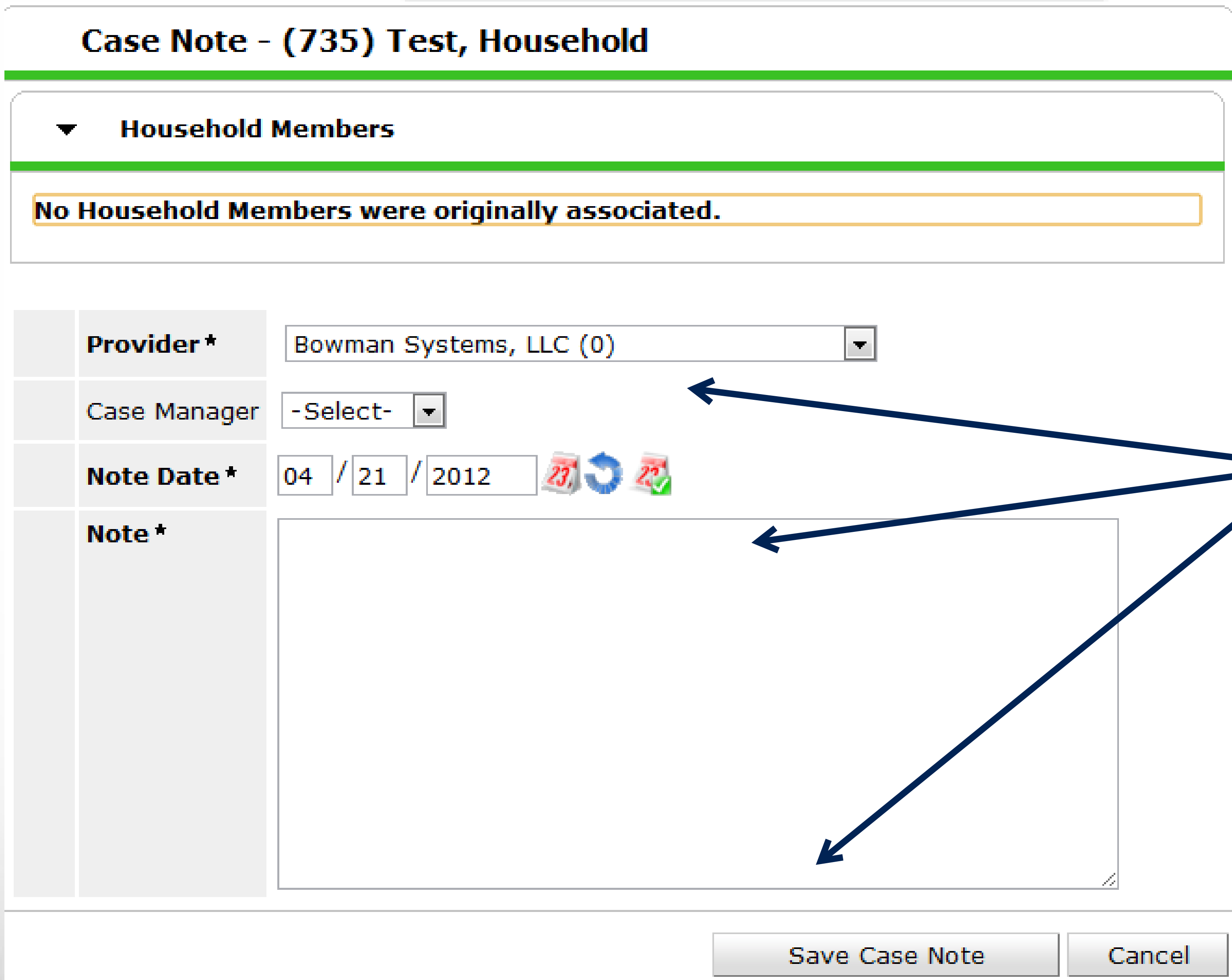
# Case Notes




Fill in the "Note Date". This date will default to the day you are working on and can be changed. Enter the "Note" in the space provided. Notes can be copied and pasted from other word processing programs. Click on the "Save Case Note" button when finished.

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# Case Notes

After the Case Note information has been saved a history and preview of Case Notes will start appearing.

**Goals**

| | | Provider | Classification | Type | Target Date | Status | Notes | Latest Note Date | |
|---|---|---|---|---|---|---|---|---|---|
| | | Bowman Systems, LLC | Educational | Obtain GED | | Identified | 1 | 04/21/2012 | |

Add Goal

**Showing 1-1 of 1**

To edit Case Notes click on the pencil. To delete Case Notes click on the red delete icon. This function may be shut off by the System Administrator. If that is the case a magnifying glass will appear and end users will only be able to view notes and not delete or change them.

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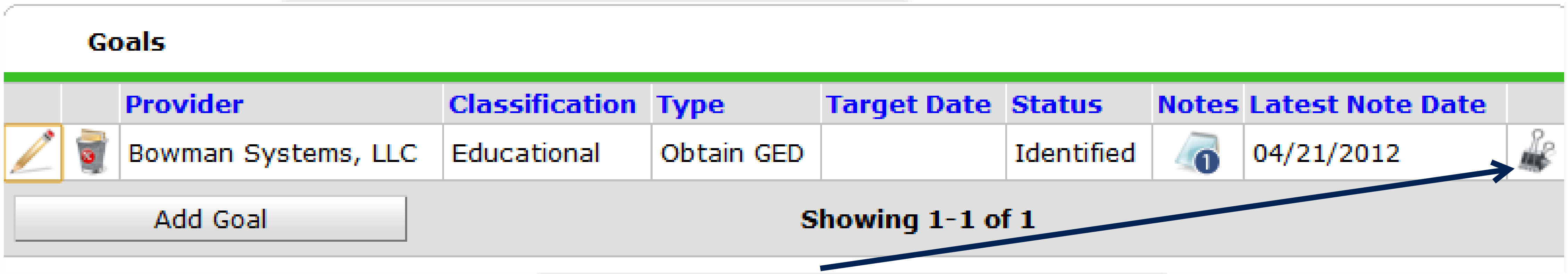
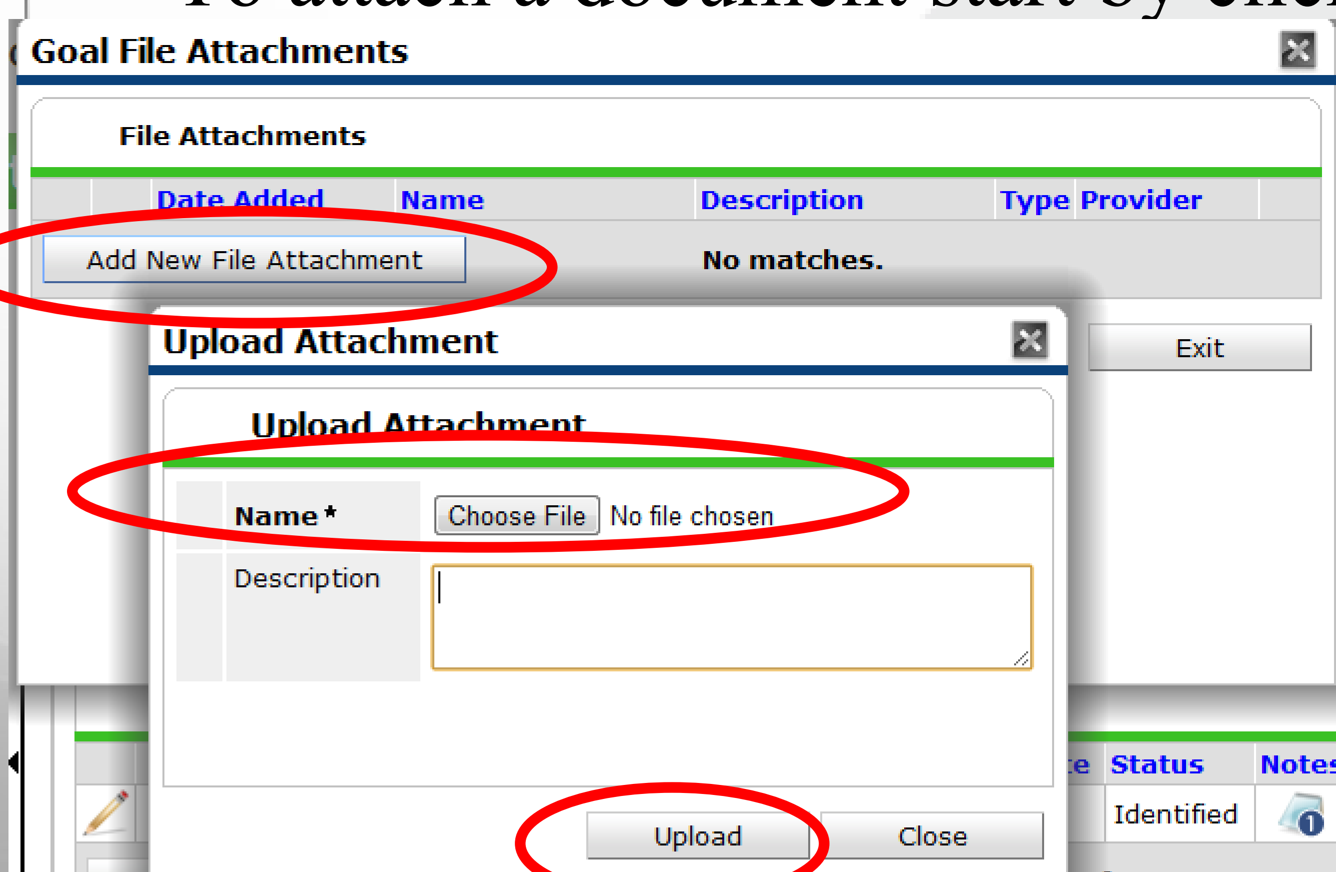
# Case Notes

The Notes column will indicate how many notes there are.




The paperclip icon will allow you to attach a document to your note. To attach a document start by clickingthe paperclip icon. In the next pop up window click “Add New File Attachment” and in the final pop up select the file to upload and click the “Upload” button.



# Action Steps

Action Steps can be added to documents the steps the client needs to take in order to complete the overall goal. Click on the “Add Action Step” button to use this feature.

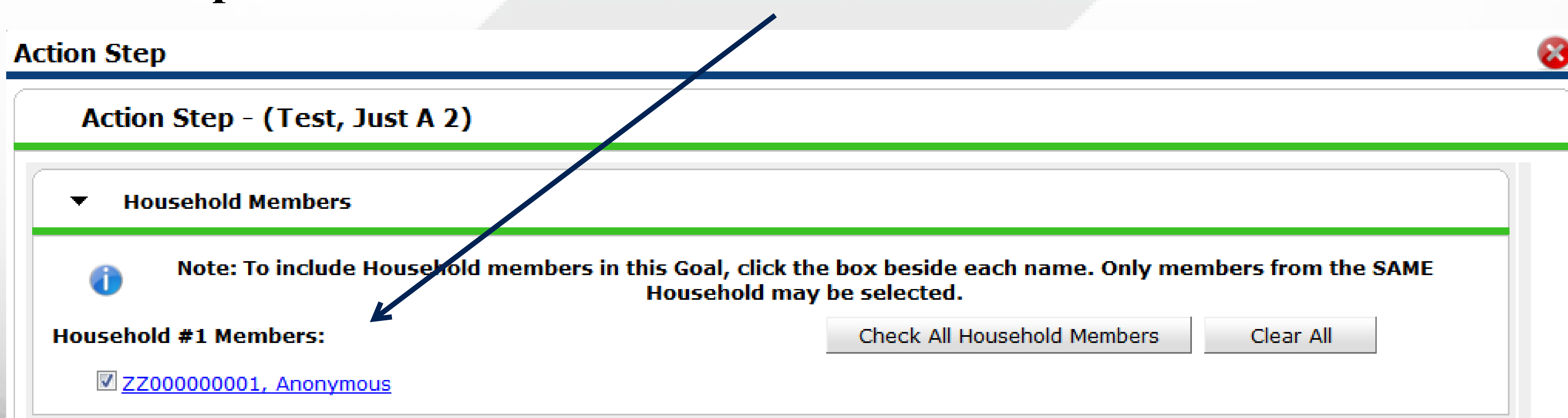
**Action Steps Planned**

| Action Step | Target Date | Status | Outcome |
|---|---|---|---|
| Add Action Step | No matches. | | |

## Action Steps

If additional Household Members were selected in the original goal then those members will appear and be selected in the Action Step. If this Action Step is only for specific members of the household or only for the client the end user is currently working on additional members can be deselected.

**NOTE: Household Members must be selected in the goal prior to adding Action Steps.**



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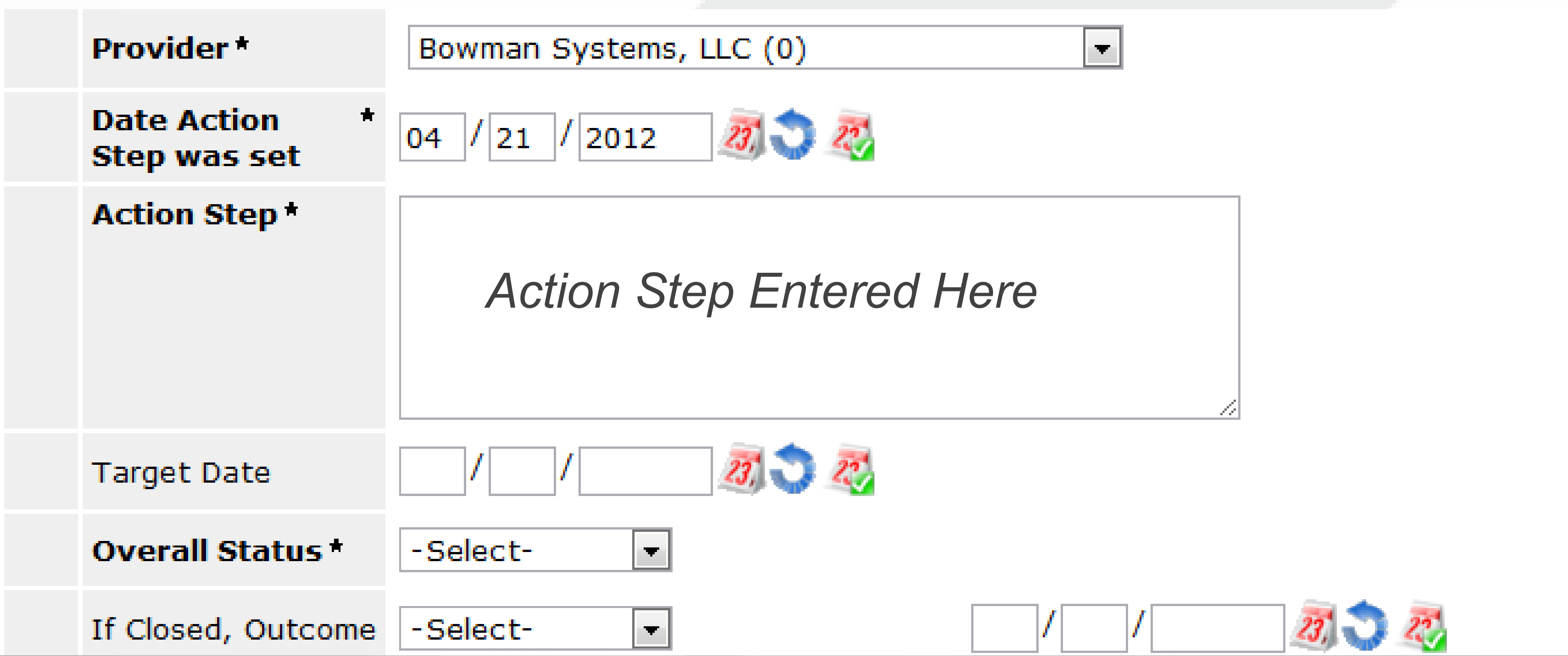
# Action Steps

The remaining section of Action Steps is filled in the same way as a goal. The exception is the actual Action Step is not a drop down list but a self defined statement that must be entered by the end user. End users will still select a Provider, enter “Date Action Step was set”, Target Date, Overall Status, and if the action step is closed the outcome and date it was closed.



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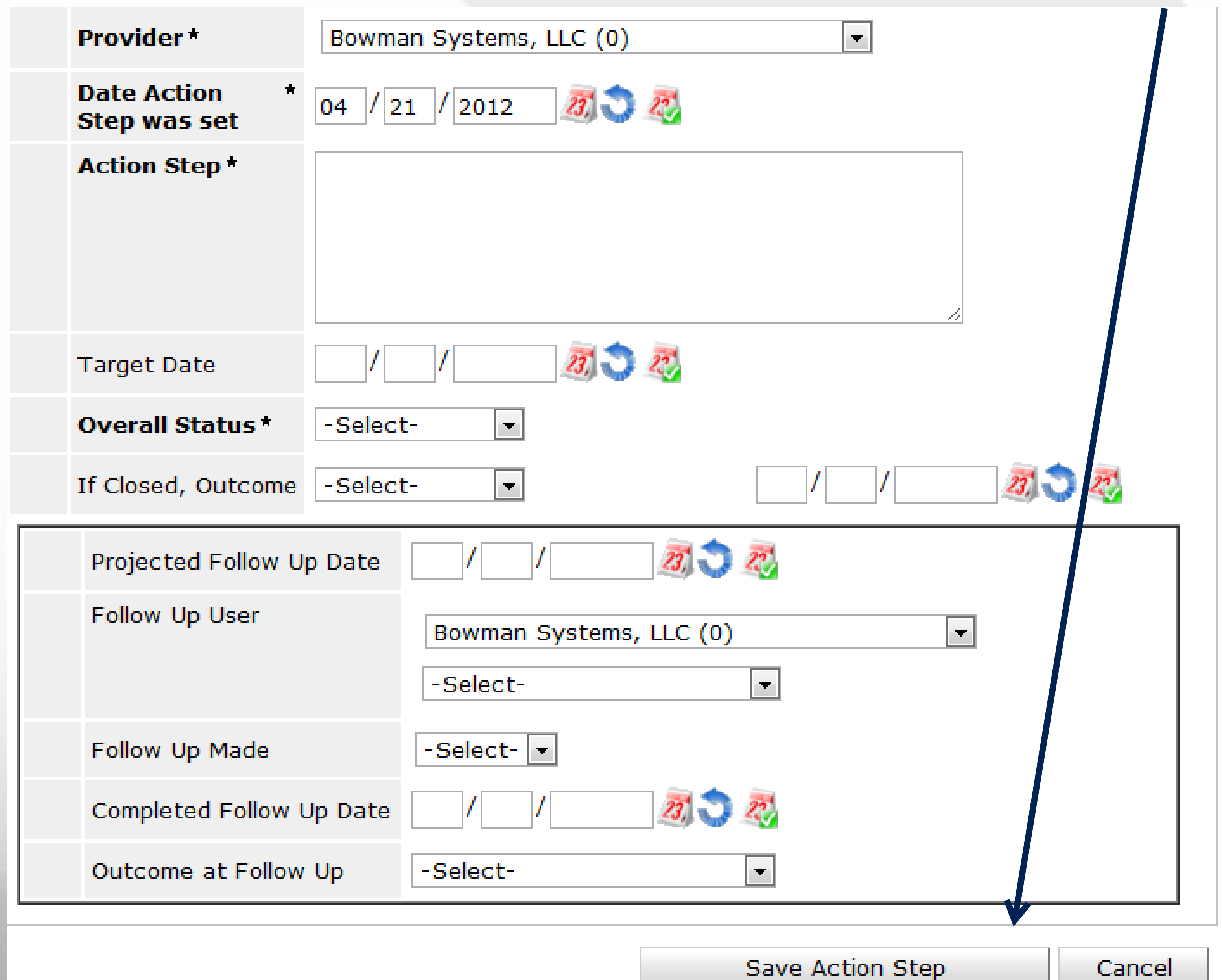
## Action Steps

Follow Ups can also be made on Action Steps using the same process as the goal. After all data has been entered for the Action Step click on "Save Action Step" button.



# Action Steps

After the Action Step information has been saved a history and preview of Action Steps will start appearing.

**Action Steps Planned**

| | | Action Step | Target Date | Status | Outcome |
|---|---|---|---|---|---|
| | | This is an Action Step. | 03/10/2011 | In Progress | |

Add Action Step

**Showing 1-1 of 1**

To edit Action Steps, click on the pencil. To delete Action Steps click on the red delete icon.

# Service Transactions

As part of case management Services may be provided to help clients achieve their goals. If case managers would like these Services related to case management and in order for those services to show in reports click on the "Add Service" button under the section labeled "Service Items for this Goal".

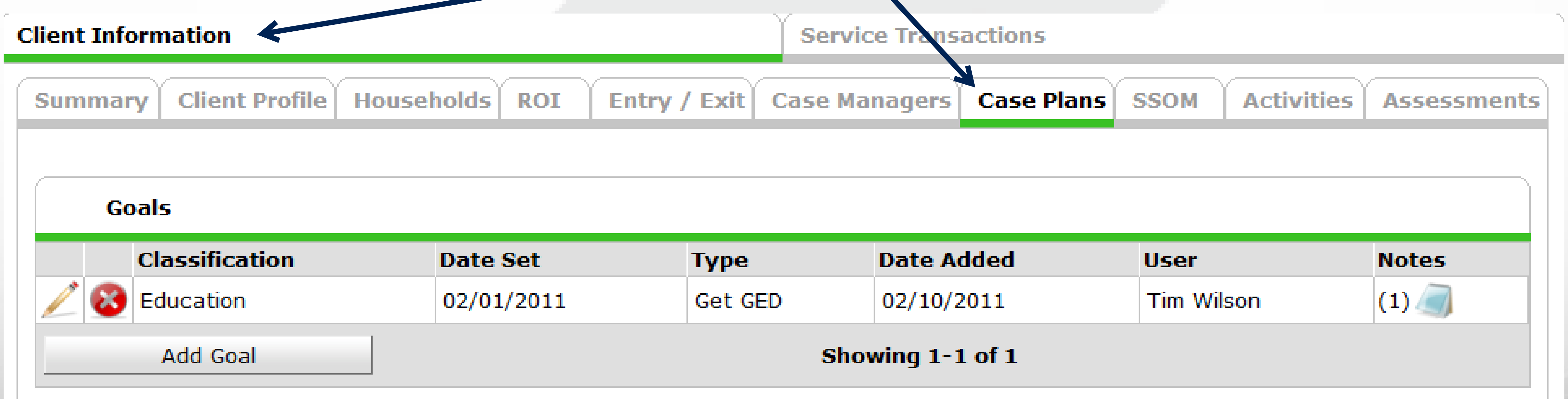
**Service Items for this Goal**

| Date Set | Created By | Need Type | Status | Outcome |
|---|---|---|---|---|
| Add Service | | No matches. | | |

Collaborate. Coordinate. Evaluate.

# Service Transactions

By clicking on the “Add Service” button, the Goal pop up will be closed and the end user will be directed to the Service Transaction page. From here follow your normal workflow and enter Services as you normally would. You are now in Service Transactions so Click back to the “Client Information” Tab and then back to the “Case Plans” tab.



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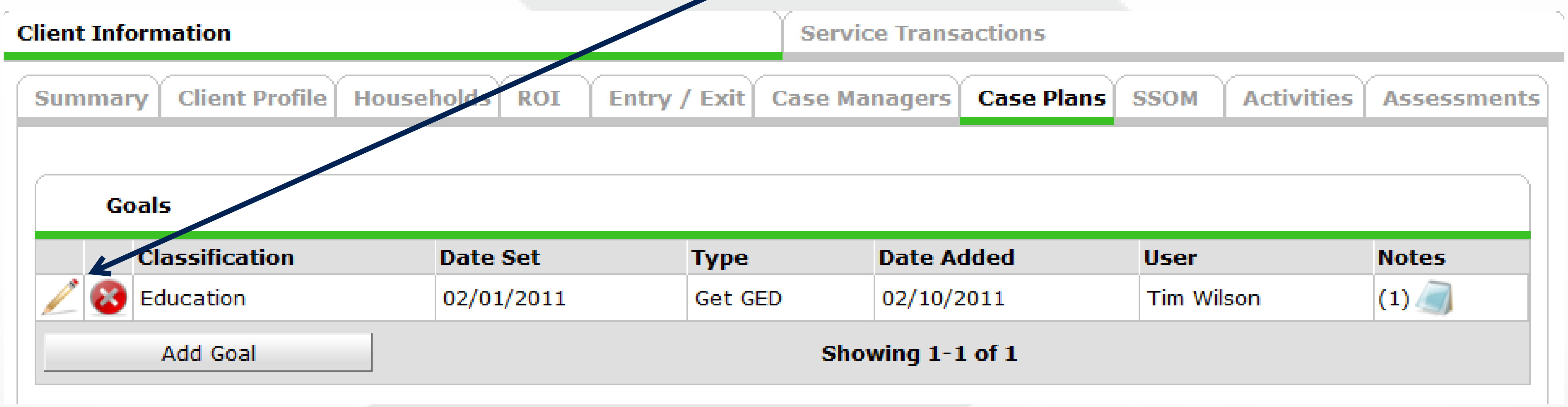
# Service Transactions

Once there click on the edit pencil next to the goal you have entered the Service Transaction for.



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# Service Transactions

By doing this you can see that a history and preview of Service Items for this Goal will start appearing.

**Service Items for this Goal**

| | | Date Set | Created By | Need Type | Status | Outcome |
|---|---|---|---|---|---|---|
| | | 02/10/2011 | Tim Wilson | Database Development/Maintenance Assistance | Identified | |

Add Service

**Showing 1-1 of 1**

To edit Service Items click on the pencil. To delete Service Items click on the red delete icon.

# For Your Information

**After Service Items are entered then you have completed all steps in the Case Plan process. When finished select “Save Goal”, “Save & Exit”, or “Exit” (will not save) on the lower right hand corner of the pop window. (Displayed on next slide)**

Collaborate. Coordinate. Evaluate.

# For Your Information

## Case Notes

| | | Provider | Case Manager | User | Note Date | Note |
|---|---|---|---|---|---|---|
| | | Professional Services Training Provider | case manager | Tim Wilson | 02/10/2011 | Case notes are entered here. |

Add Case Note — **Showing 1-1 of 1**

## Action Steps Planned

| | | Action Step | Target Date | Status | Outcome |
|---|---|---|---|---|---|
| | | This is an Action Step. | 03/10/2011 | In Progress | |

Add Action Step — **Showing 1-1 of 1**

## Service Items for this Goal

| | | Date Set | Created By | Need Type | Status | Outcome |
|---|---|---|---|---|---|---|
| | | 02/10/2011 | Tim Wilson | Database Development/Maintenance Assistance | Identified | |

Add Service — **Showing 1-1 of 1**

Print — Save Goal — Save & Exit — Exit

Collaborate. Coordinate. Evaluate.

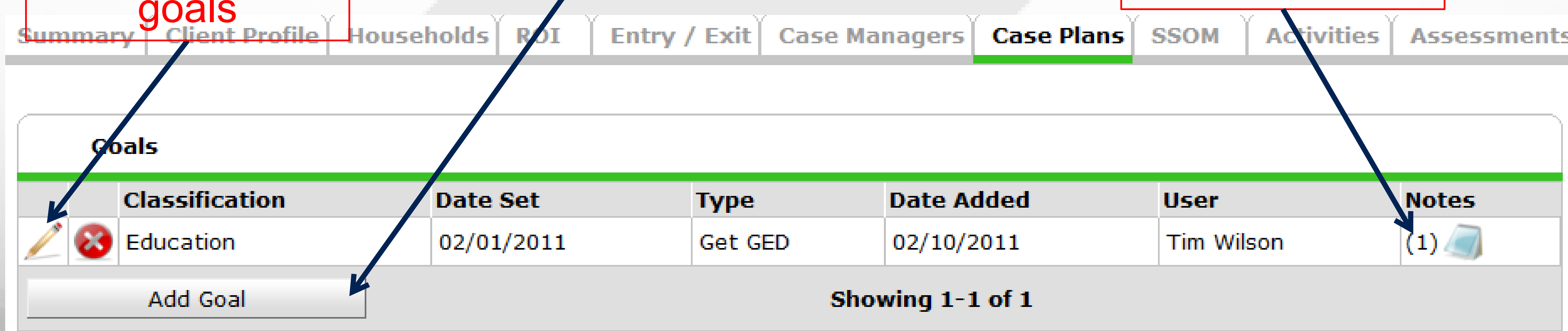
# For Your Information

**Add goals can be repeated for additional goals this client/household needs. To add to Action Steps, Case Notes, Service Items for this Goal simply click on the pencil next to the Case Plan that needs updated in the Case Plans tab.**

Adds Action Steps, Case Notes, Services to existing goals

Adds Additional Goals

This number reflects the number of Case Notes attached to this goal



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Printing

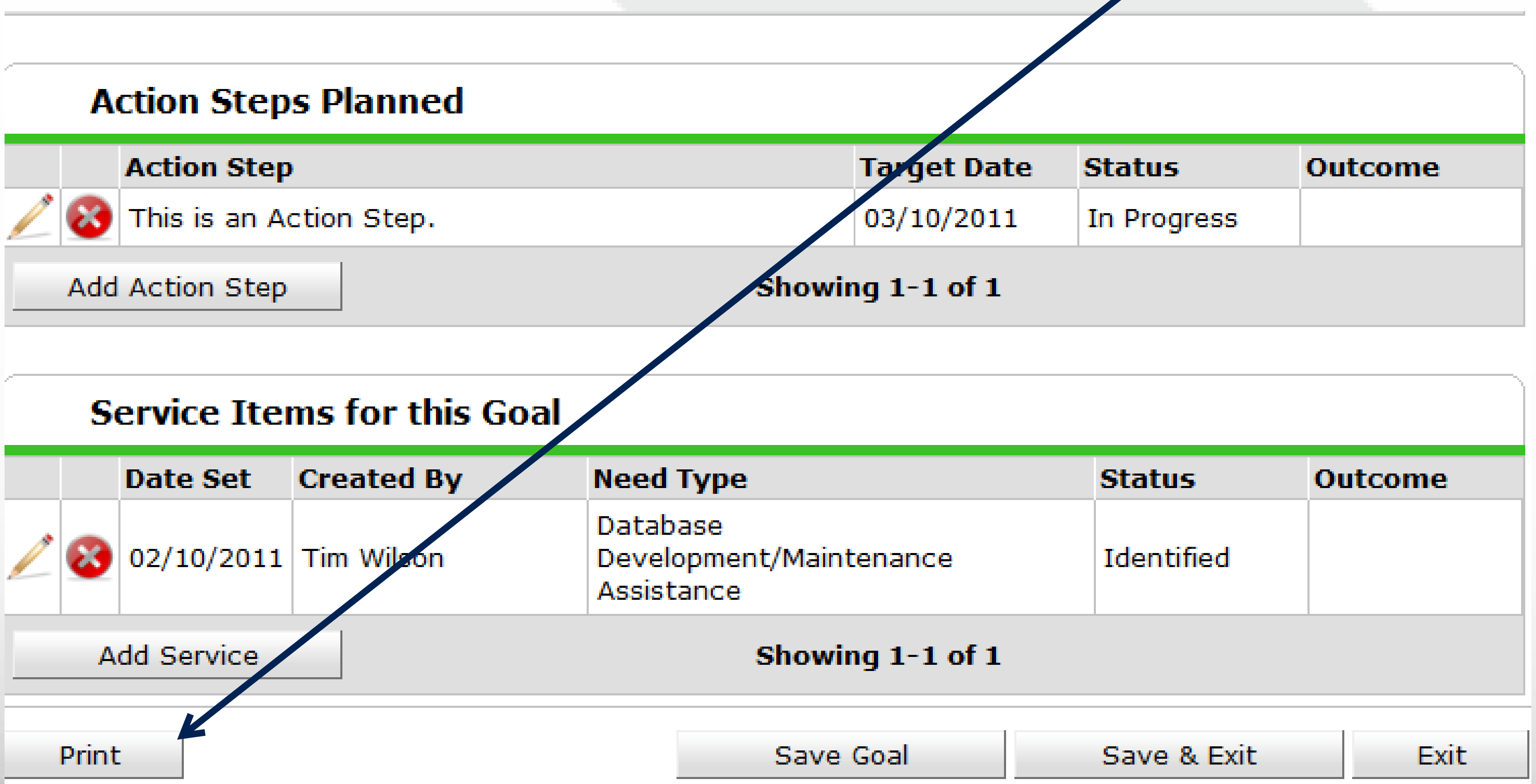
# Print Case Plans and Goal Details

Within the case management option case managers will have the option to print case plans and goal details.

Collaborate. Coordinate. Evaluate.

# Printing

Goal details can be printed within the goal itself. If you are not currently in the goal you will need to click the edit pencil next to the goal you wish to print details on. Once there look for the "Print" button on the lower left corner of the goal.



**Action Steps Planned**

| | | Action Step | Target Date | Status | Outcome |
|---|---|---|---|---|---|
| | | This is an Action Step. | 03/10/2011 | In Progress | |

Add Action Step — Showing 1-1 of 1

**Service Items for this Goal**

| | | Date Set | Created By | Need Type | Status | Outcome |
|---|---|---|---|---|---|---|
| | | 02/10/2011 | Tim Wilson | Database Development/Maintenance Assistance | Identified | |

Add Service — Showing 1-1 of 1

Print — Save Goal — Save & Exit — Exit

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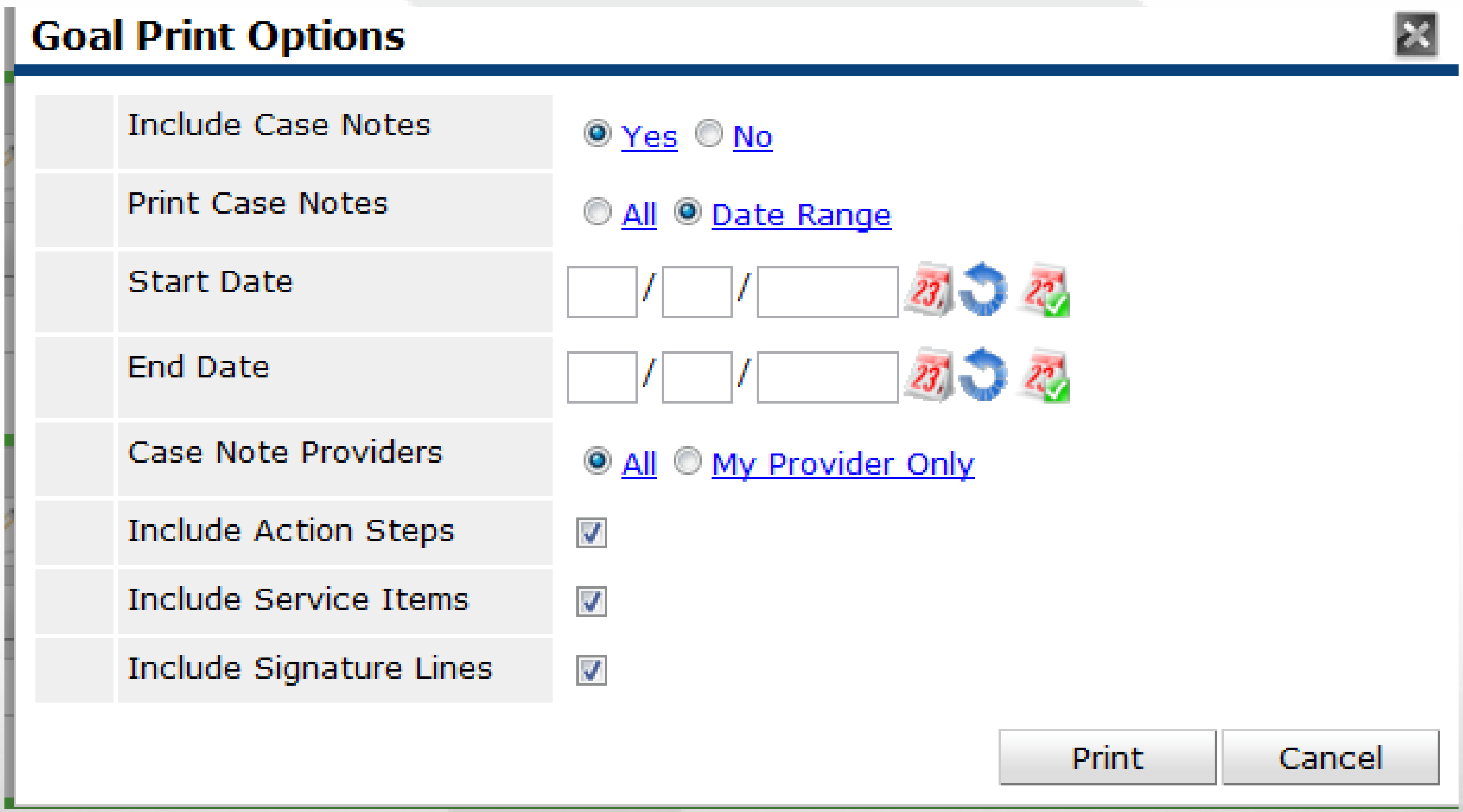
## Printing

A print options pop up will appear. From here you will select the options that you wish to appear on the print out.



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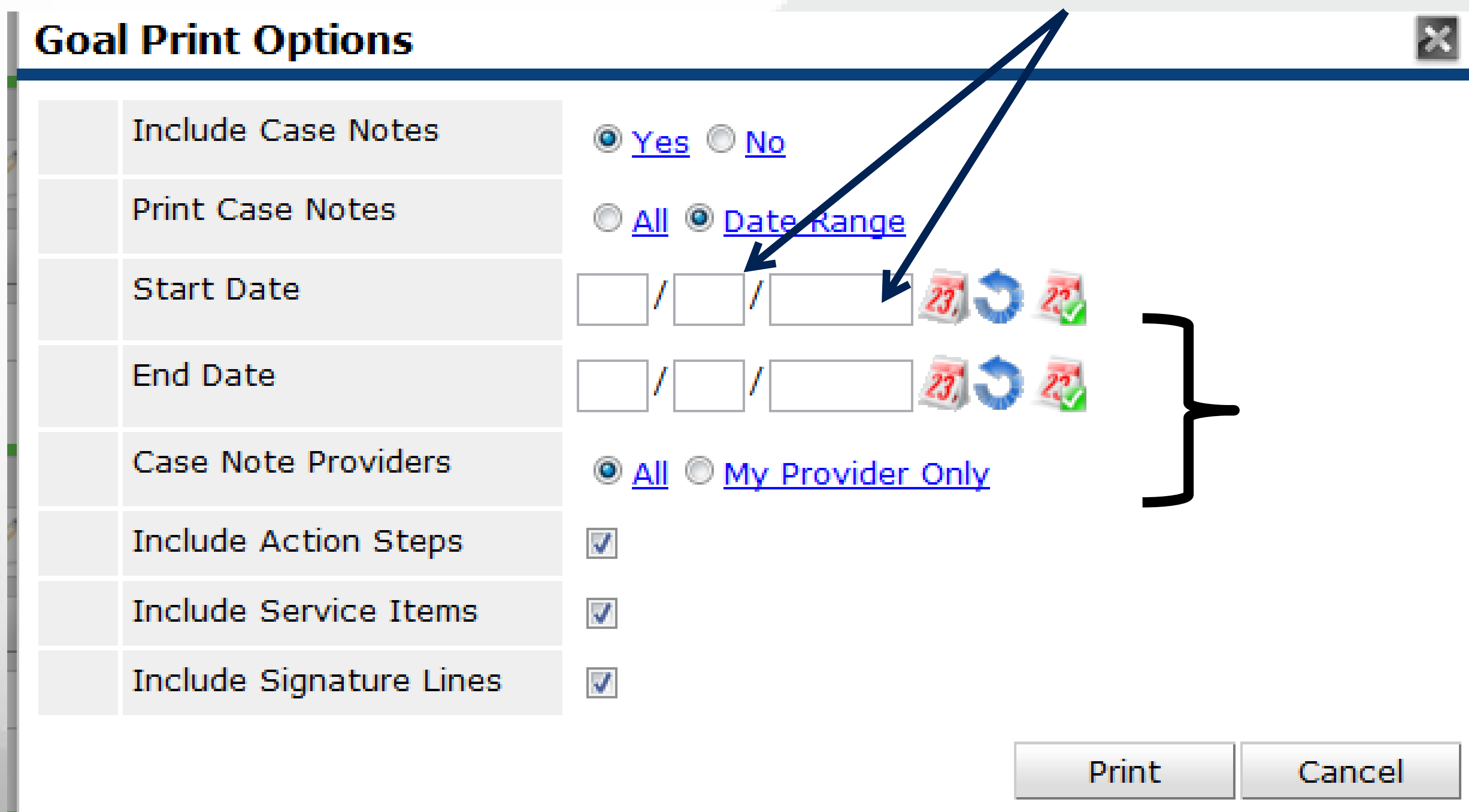
# Printing

The “Print Case Notes” is conditional on the question “Include Case Note”. If “Yes” is selected then “Print Case Notes” will appear and the user will need to select either All or a Date Range. If Date Range is selected then a “Start Date” and “End Date” will appear and need to be entered. Providers can be changed to All Providers or just the provider for the End User.



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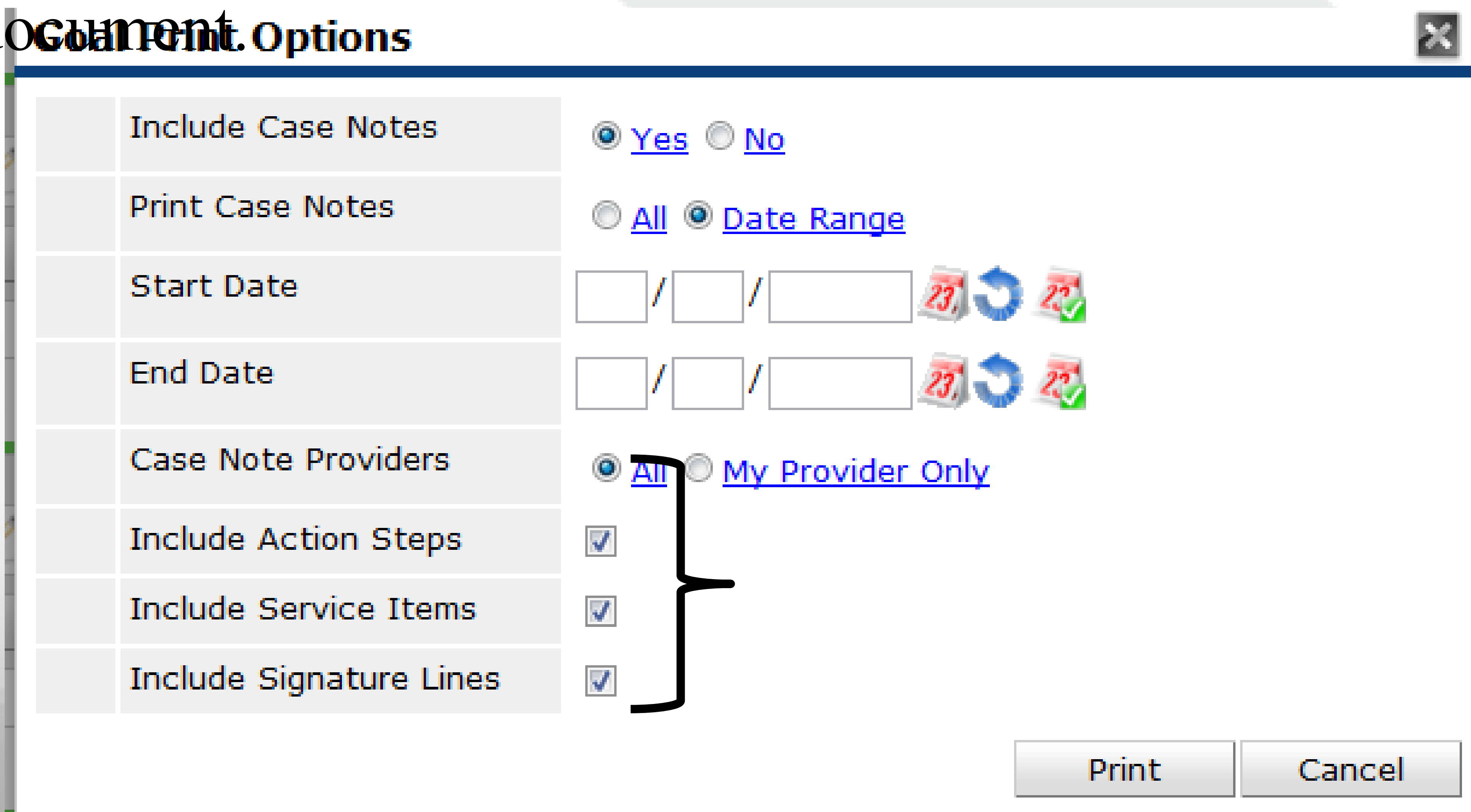
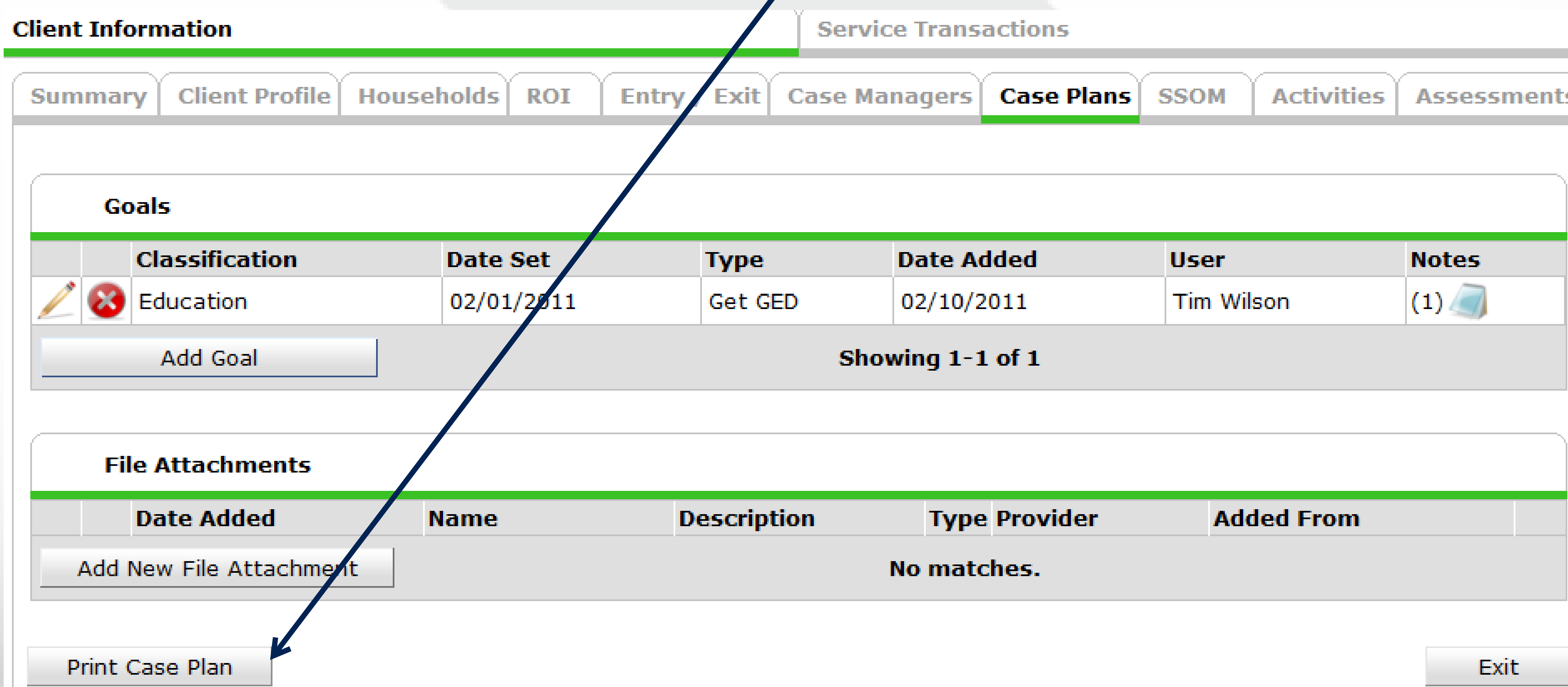
# Printing

By checking each option end users can print Action Steps, Service Items, and Signature lines.  The signature lines will have lines for both the case manager and the client to sign and date the form.  When finished select the “Print” button to print the document.



# Printing

Case Plans are printed directly from the "Case Plans" tab. There is a "Print Case Plan" button on the lower left corner of the screen.

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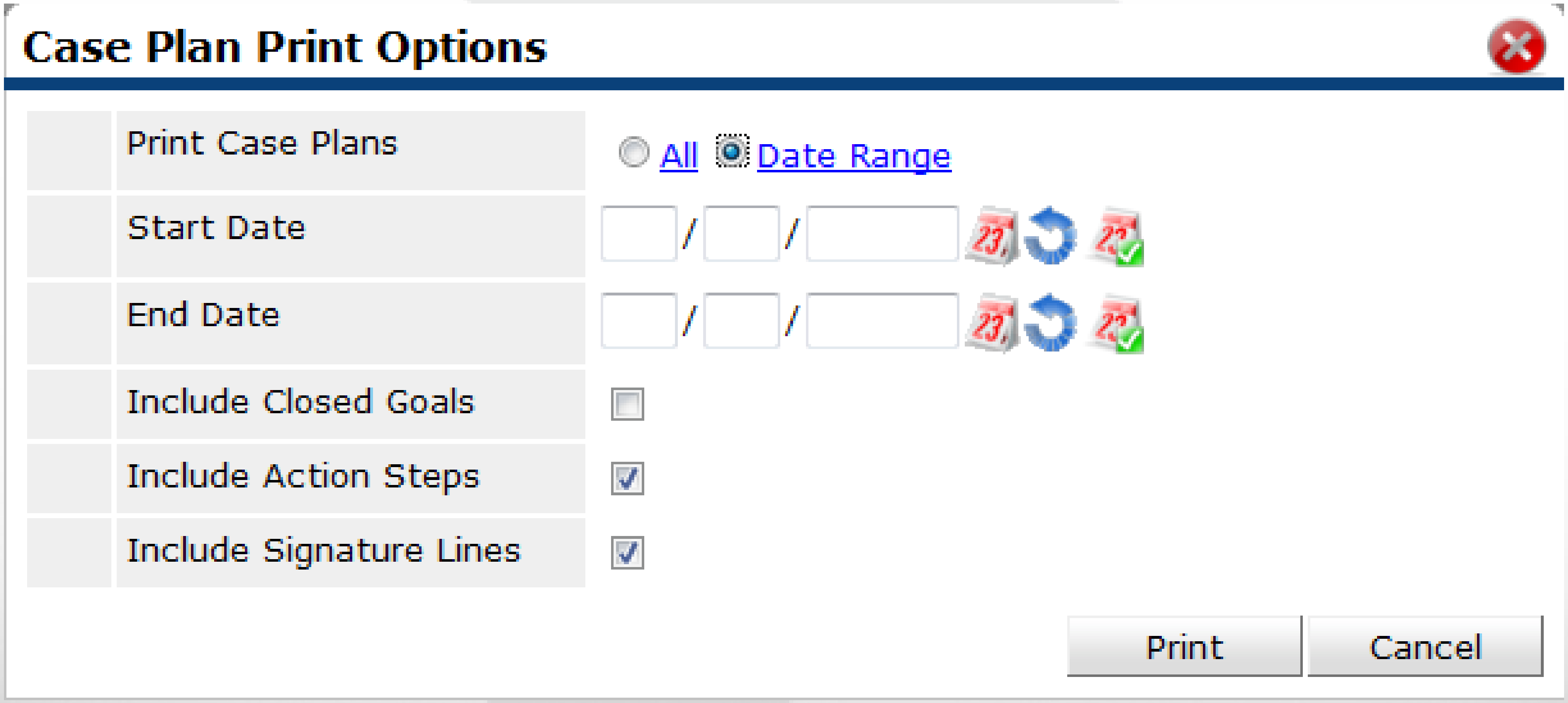
# Printing

A print options pop up will appear. From here you will select the options that you wish to appear on the print out.



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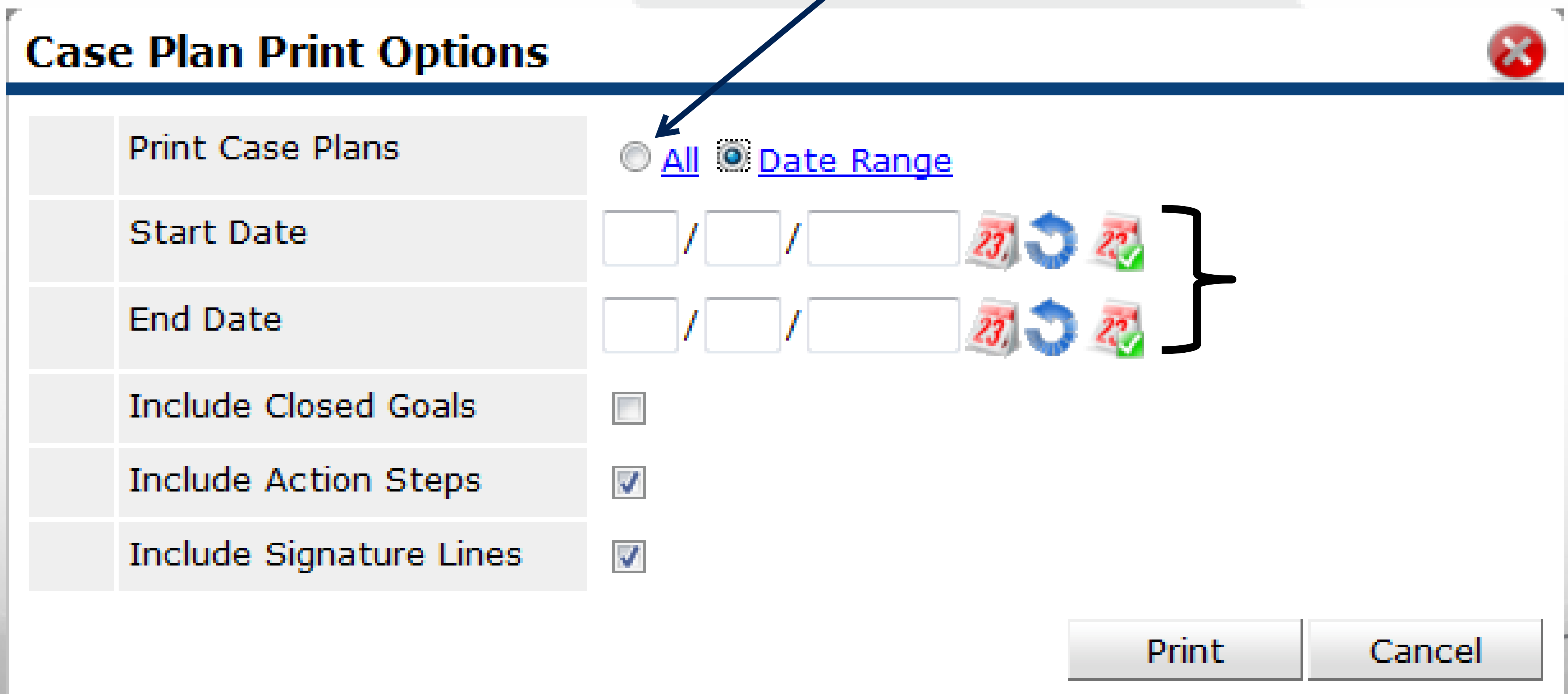
# Printing

The case manager can determine if they wish to print all Case Plans or just those within a specific Date Range. If the Date Range option is selected the end user will need to include a Start Date and End Date. Start Date and End Date will not appear if the end user selects "All"


Case Plan Print Options

| | |
|---|---|
| Print Case Plans | All / Date Range |
| Start Date | / / |
| End Date | / / |
| Include Closed Goals | ☐ |
| Include Action Steps | ☑ |
| Include Signature Lines | ☑ |

Print Cancel

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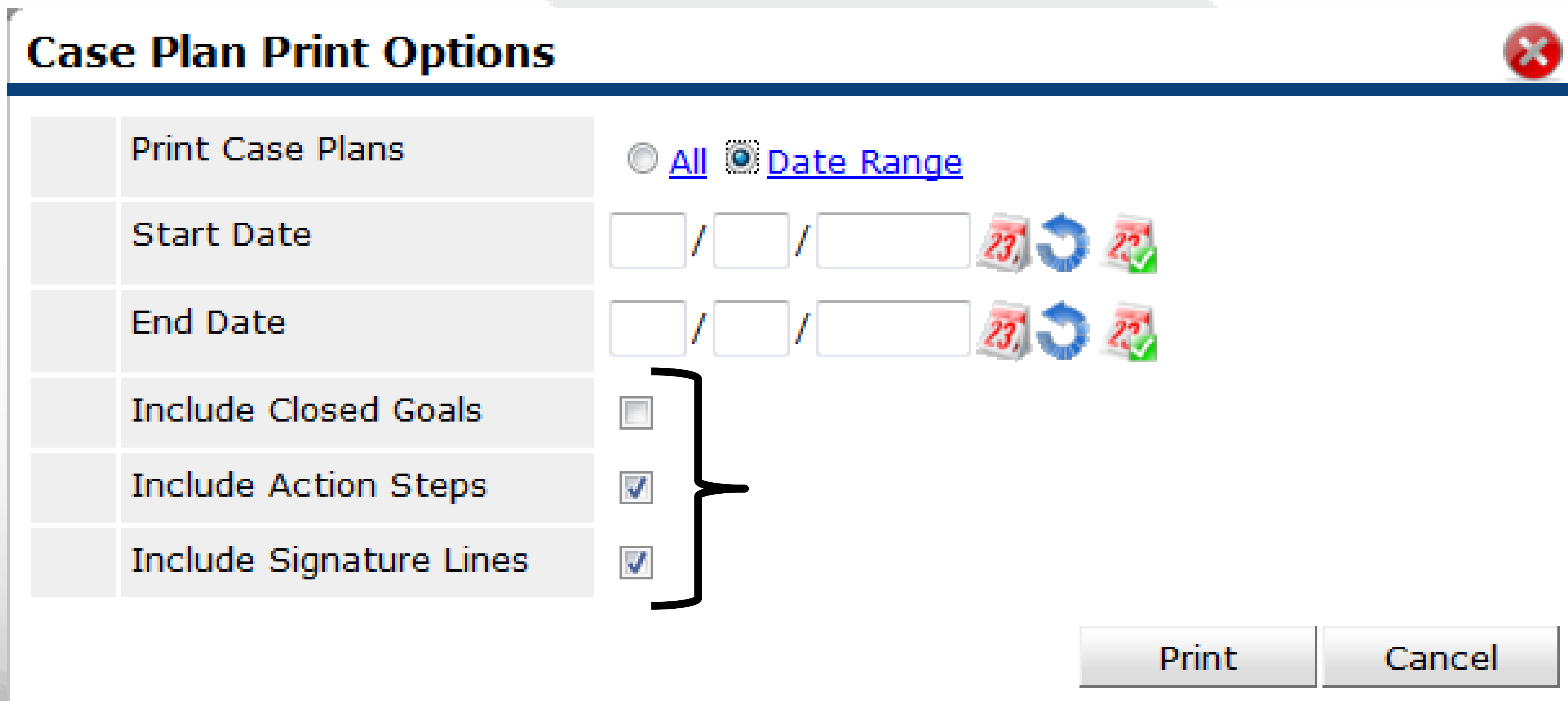
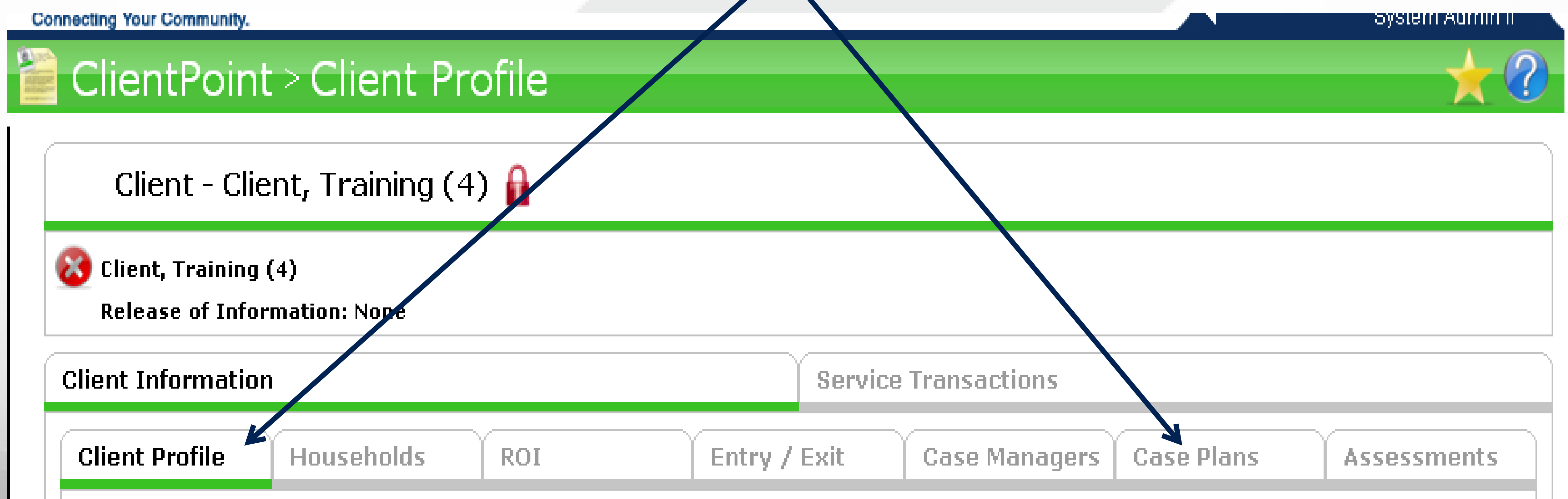
## Printing

The end user can then decide whether to include Closed Goals, Action Steps, and Signature lines by placing a check in the box. The signature lines will have lines for both the case manager and the client to sign and date the form. When finished select the "Print" button to print the document.



# File Attachments

File attachments may be used to attach supporting documents for case management or case notes previously type in word processing software. Files can be attach either on the "Client Profile" tab or the "Case Plan" tabs. On both of these tabs the "File Attachment" section appears at the bottom of the page.



# File Attachments

Once on the "Client Profile" or "Case Plans" tab, scroll to the bottom for the "File Attachments" section.  There click on the "Add New File Attachment" button.

**File Attachments**

| Date Added | Name | Description | Type | Provider | Added From |
|---|---|---|---|---|---|
| Add New File Attachment | | No matches. | | | |

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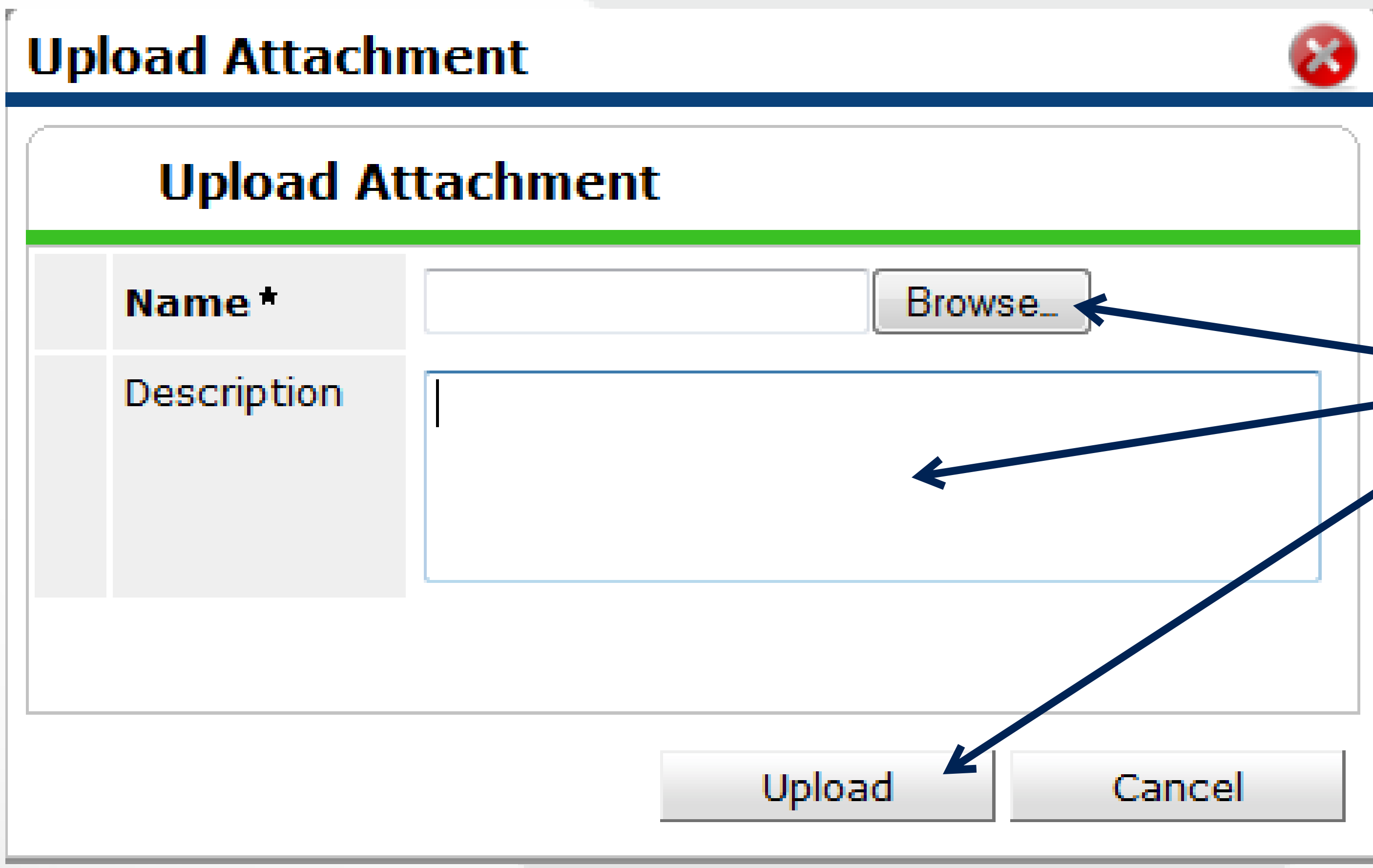
# File Attachments




The “Upload Attachment” popup will appear. From there select “Browse” to search your computer for the file you need to upload. You may enter a description of the file in the “Description” field. When finished select the “Upload” button.

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# File Attachments

Once the file is uploaded you will see a history of all the files that have been uploaded. To “View” the file click on the magnifying glass. Click on the Trash Can icon to delete the file. If needed security can also be changed on the file by clicking on the padlock icon. The Added from column will display where the file was attached from, i.e. ROI, Entry/Exit, Case Goal, etc.

**File Attachments**

| | | Date Added | Name | Description | Type | Provider | Added From | |
|---|---|---|---|---|---|---|---|---|
| | | 04/21/2012 | ServicePoint 5.0 Rollout FAQs.pdf | | pdf | Bowman Systems, LLC | Client Profile | |

Add New File Attachment

**Showing 1-1 of 1**