

Collaborate. Coordinate. Evaluate.

*ServicePoint*TM

version 5.7

Case Plans Workflow



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.



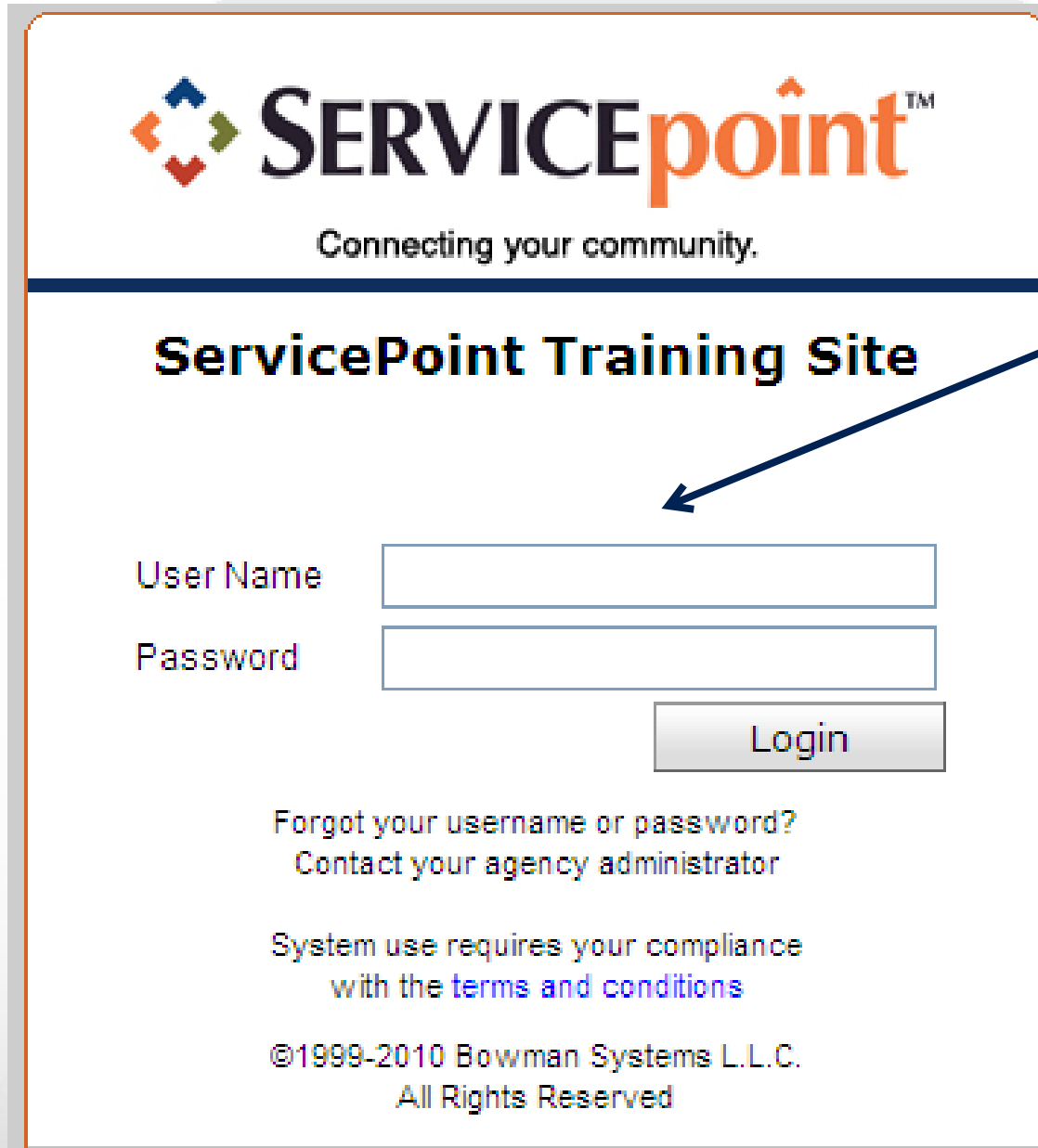
Learning Objectives

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 Managers***
 - **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**



ServicePoint v5.3



The screenshot shows the ServicePoint Training Site login interface. At the top is the ServicePoint logo with the tagline "Connecting your community." Below this is the title "ServicePoint Training Site". The login form consists of two input fields: "User Name" and "Password", followed by a "Login" button. Below the login fields are links for "Forgot your username or password? Contact your agency administrator" and "System use requires your compliance with the terms and conditions". At the bottom, there is a copyright notice: "©1999-2010 Bowman Systems L.L.C. All Rights Reserved".

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*®.



ClientPoint “The filing cabinet!”

Connecting Your Community.

ClientPoint > Client Search

Last Viewed Favorites

Home

ClientPoint

ResourcePoint

ShelterPoint

SkamPoint

Reports

Admin

Logout

Client Search

Note: Please Search the System before adding a New Client.

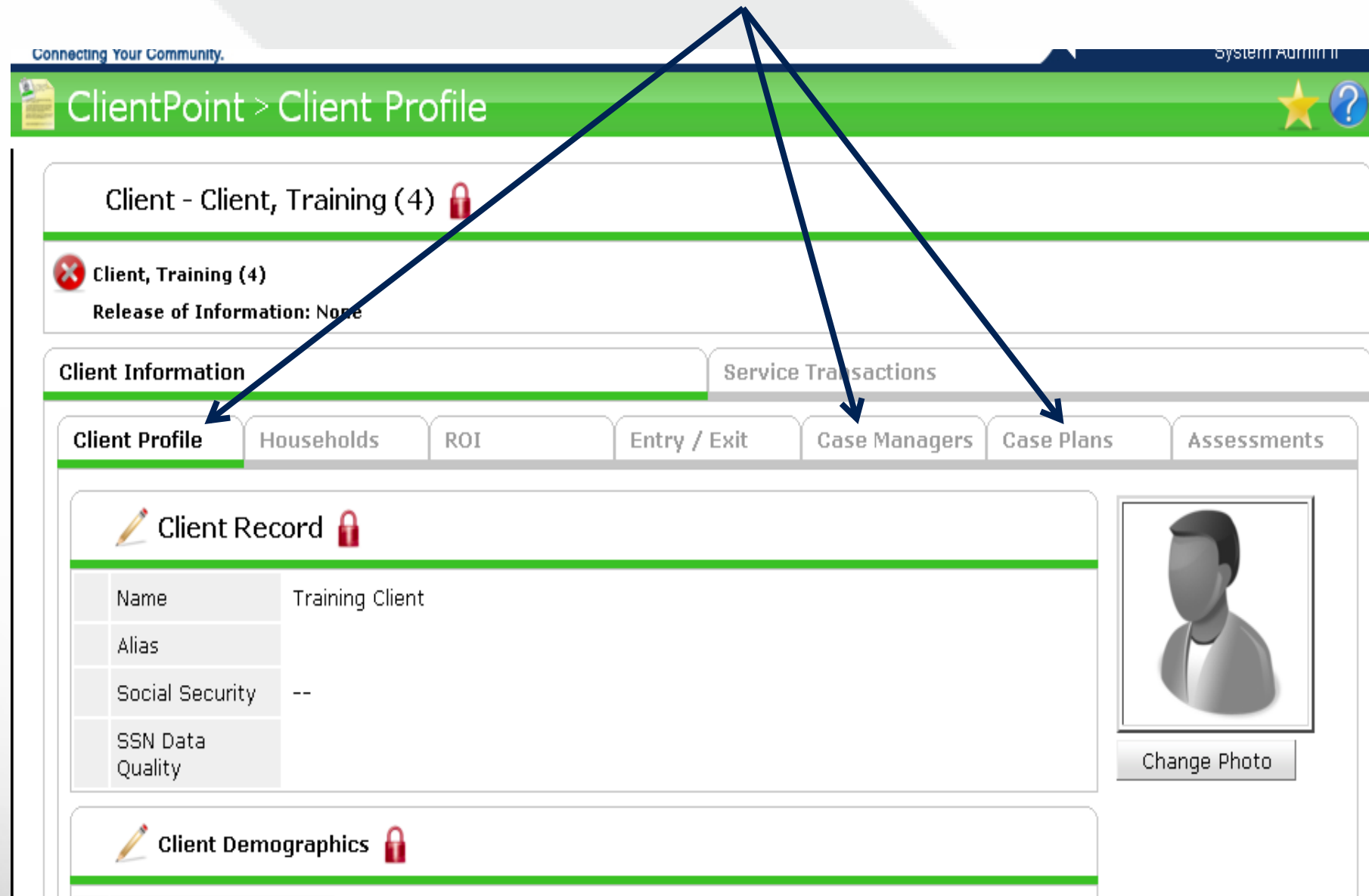
	First	Middle	Last	Suffix	
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Alias	<input type="text"/>				
Social Security Number	<input type="text"/>	-	<input type="text"/>	-	<input type="text"/>
Social Security Number Data Quality	<input type="text" value="-Select-"/>				

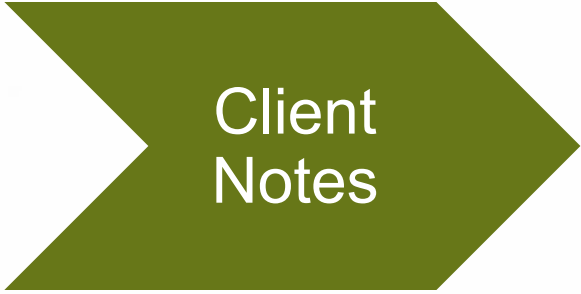
Search for existing clients, or add clients



“Client Information Tab”

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

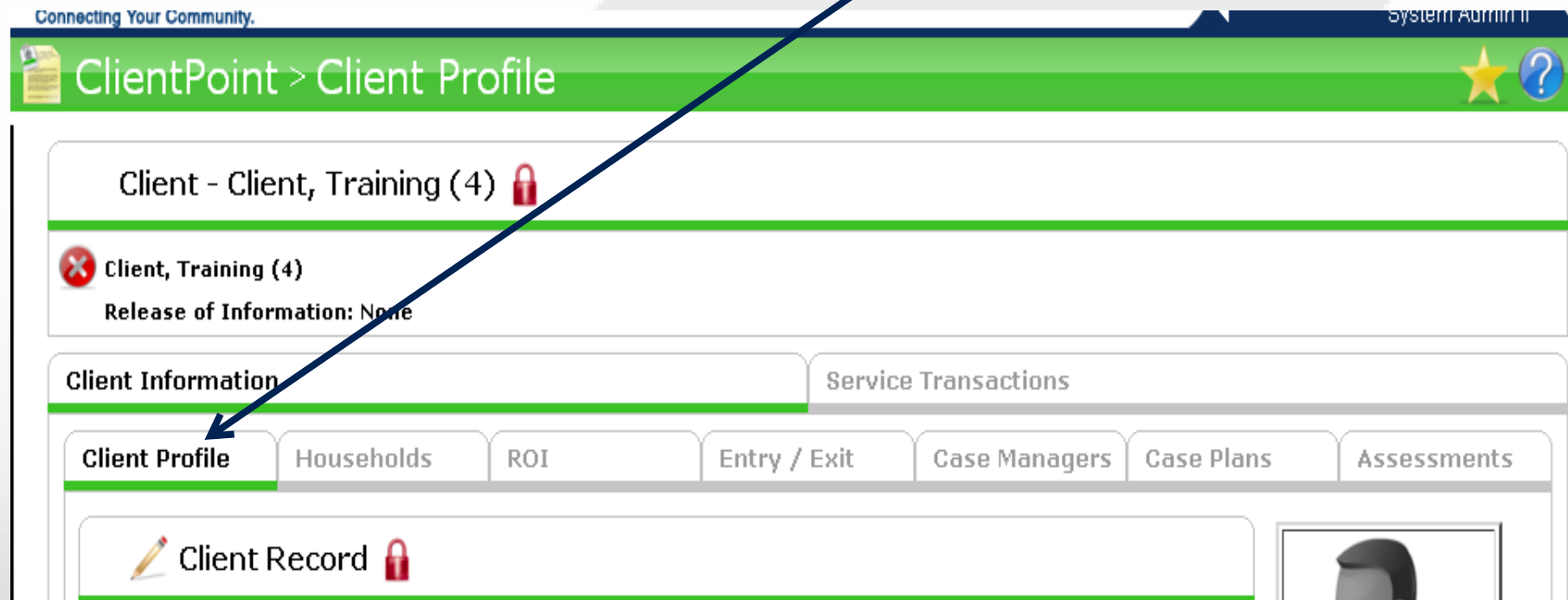




Client
Notes


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.



Connecting Your Community. System Admin II



ClientPoint > Client Profile

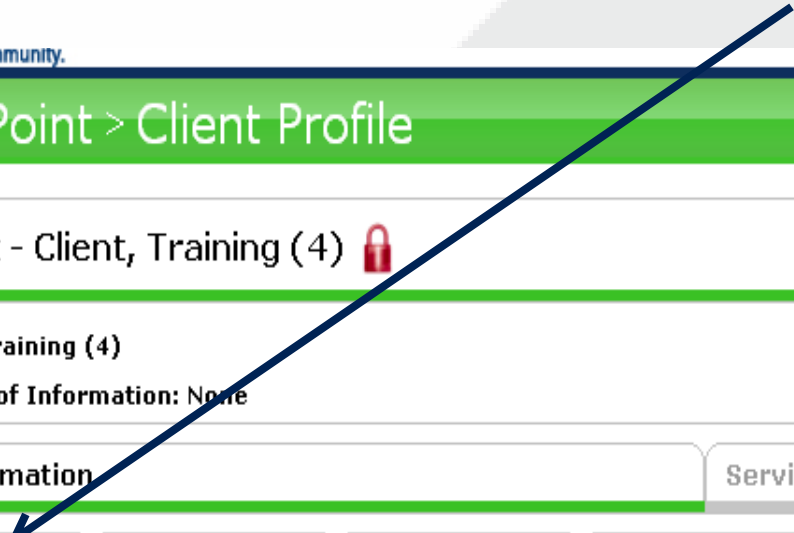
Client - Client, Training (4) 

 Client, Training (4)
Release of Information: None

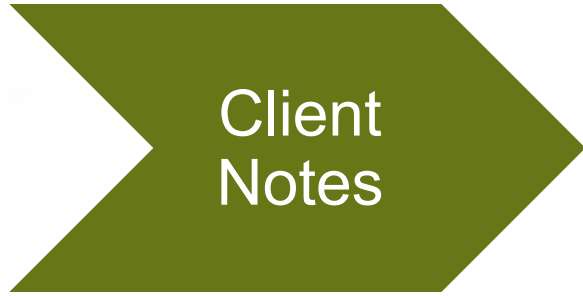
Client Information Service Transactions

Client Profile Households ROI Entry / Exit Case Managers Case Plans Assessments

 Client Record 













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

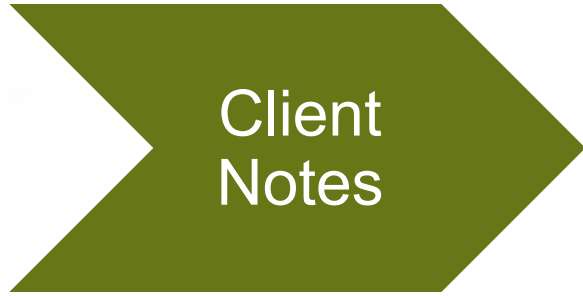
	Provider	Note Date	Note Preview	Full Note
 	Bowman Systems, LLC	05/01/2011	This is a test	

Showing 1-1 of 1

File Attachments

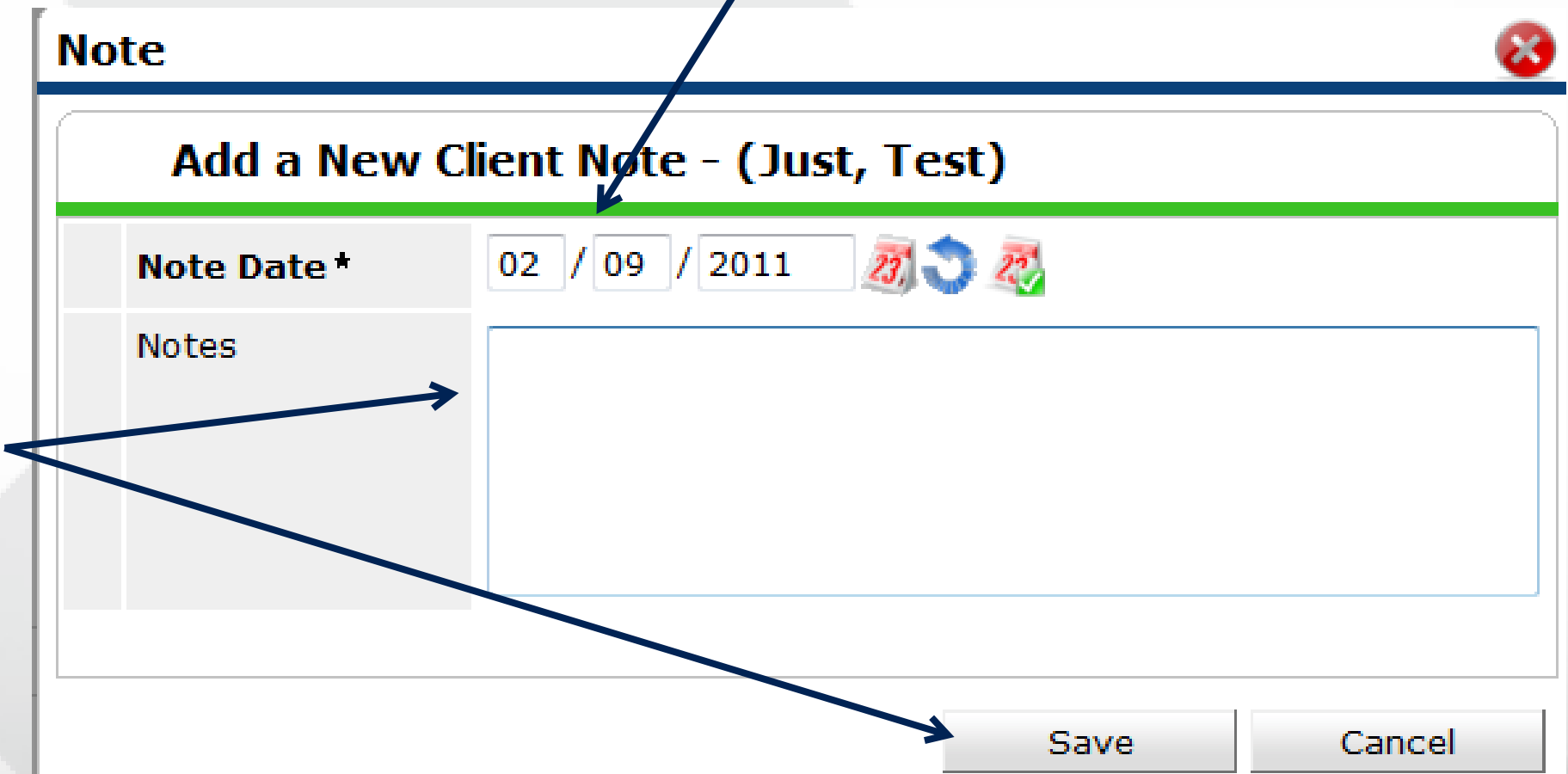
	Date Added	Name	Description	Type	Provider	Added From	
 	03/29/2012	ServicePoint Technical Specifications.pdf		pdf	Bowman Systems, LLC	Entry/Exit	

Showing 1-1 of 1



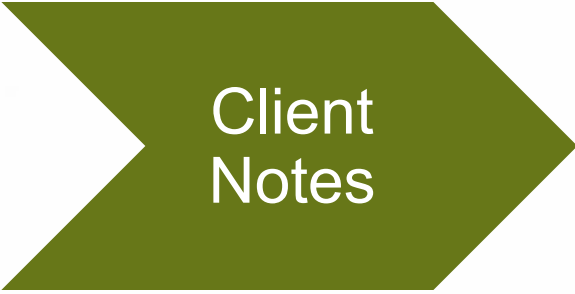
The Client Note data entry screen will pop up. Enter the date of the note by typing in the date or using the calendar options to the right of the question. The Note Date is a required field.

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






Note	
Add a New Client Note - (Just, Test)	
Note Date *	02 / 09 / 2011
Notes	
Save Cancel	





Client Notes

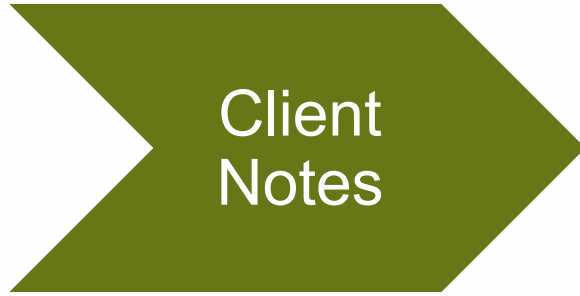
After the note has been entered and saved a history and preview of notes will start appearing.

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




Showing 1-1 of 1

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





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	<input checked="" type="radio"/> All <input type="radio"/> Date Range
Client Note Providers	<input checked="" type="radio"/> All <input type="radio"/> My Provider Only

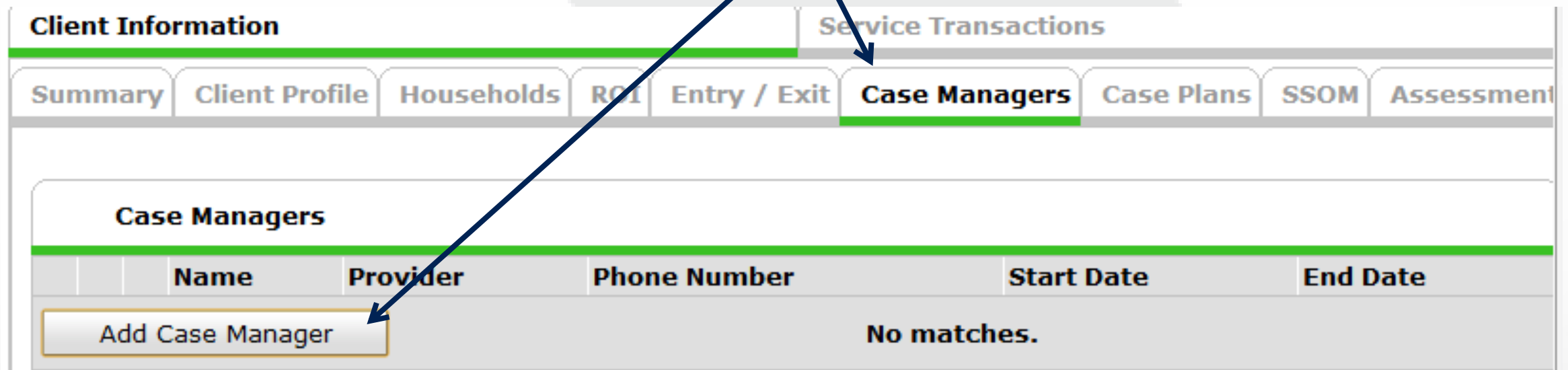
Print Cancel



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.



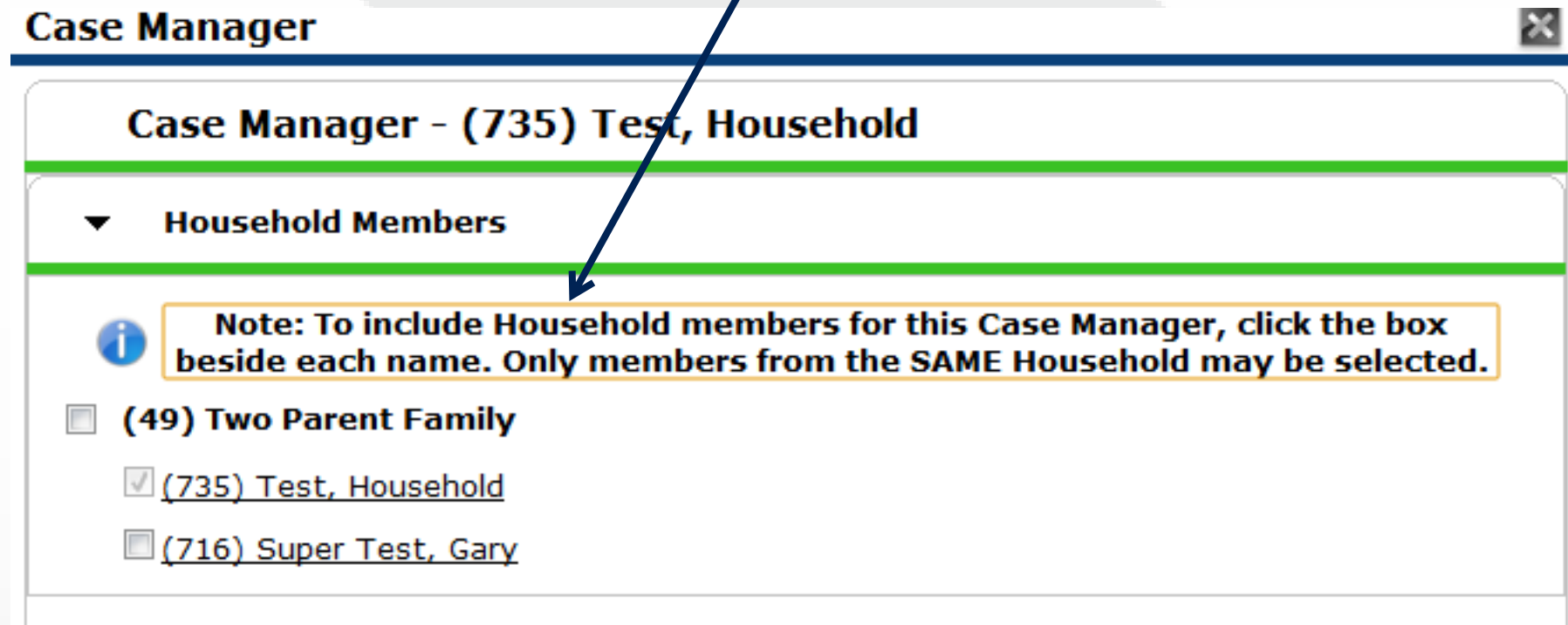
The screenshot shows a web interface with two main sections: 'Client Information' and 'Service Transactions'. Under 'Service Transactions', there are several tabs: 'Summary', 'Client Profile', 'Households', 'ROI', 'Entry / Exit', 'Case Managers', 'Case Plans', 'SSOM', and 'Assessment'. The 'Case Managers' tab is highlighted in green. Below this, there is a sub-section titled 'Case Managers' with a table header containing 'Name', 'Provider', 'Phone Number', 'Start Date', and 'End Date'. Below the table is an 'Add Case Manager' button and the text 'No matches.'.

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.





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





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.

Type *	<input checked="" type="radio"/> ServicePoint User <input type="radio"/> Me <input type="radio"/> Other
Select User *	<div style="border: 1px solid #ccc; padding: 2px;">Bowman Systems, LLC (0) ▼</div> <div style="border: 1px solid #ccc; padding: 2px; background-color: #fff;"><div style="background-color: #f0f0f0; padding: 2px;">-Select-</div><div style="background-color: #007bff; color: white; padding: 2px;">-Select-</div><div style="padding: 2px;">Amy Test (224)</div><div style="padding: 2px;">Amy Test (107)</div></div>
Name *	





Case Managers

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

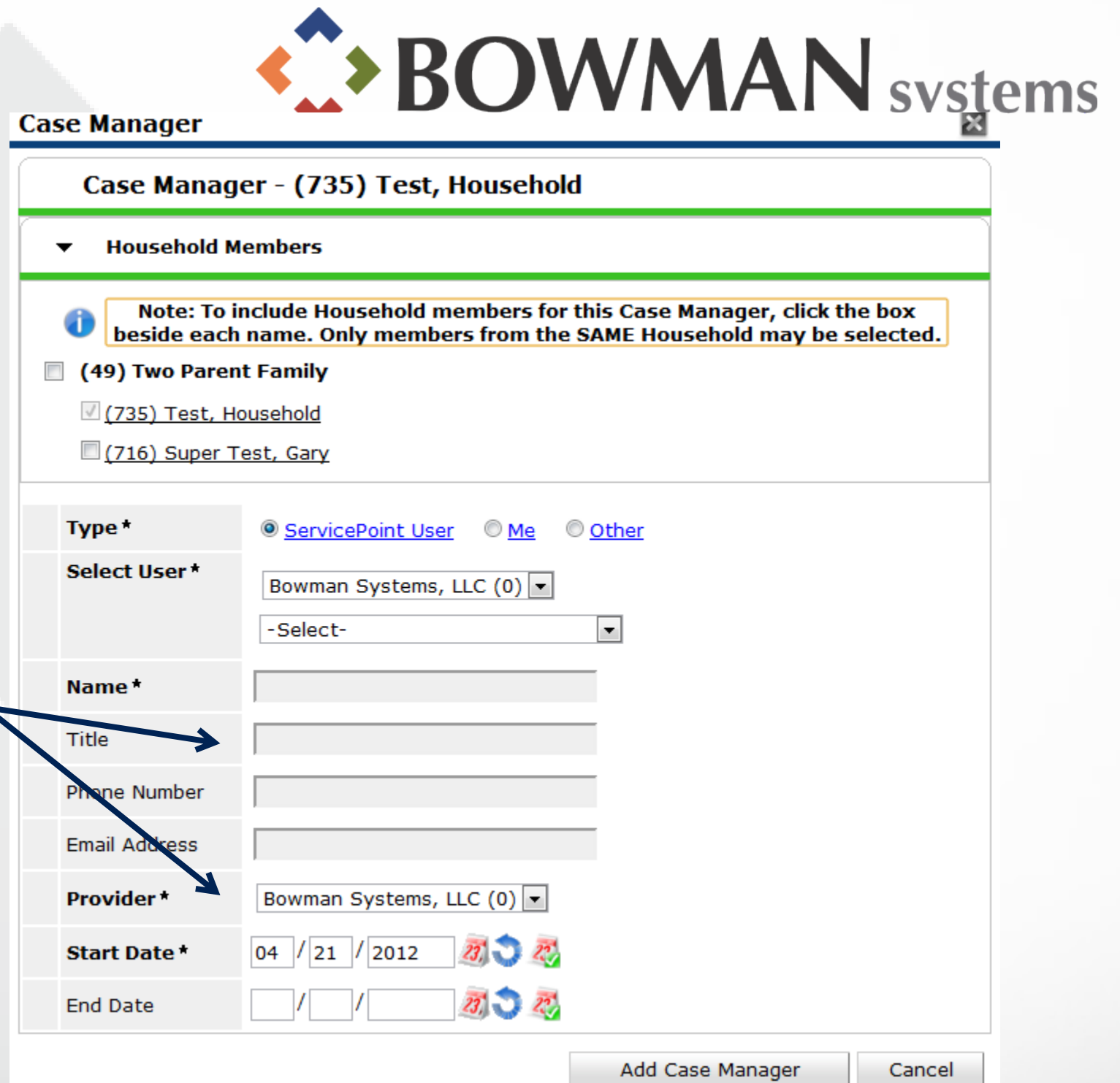
Type *	<input type="radio"/> ServicePoint User <input checked="" type="radio"/> Me <input type="radio"/> Other
Name *	<input type="text" value="New User"/>
Title	<input type="text"/>
Phone Number	<input type="text"/>
Email Address	<input type="text"/>

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 *	<input type="radio"/> ServicePoint User <input type="radio"/> Me <input checked="" type="radio"/> Other
Name *	<input type="text" value="Type In Name Here"/>
Title	<input type="text"/>



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.



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

Case Manager







Case Manager - (735) Test, Household

▼ Household Members

Note: To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.

(49) Two Parent Family

- (735) Test, Household
- (716) Super Test, Gary




Type *	<input checked="" type="radio"/> ServicePoint User <input type="radio"/> Me <input type="radio"/> Other
Select User *	Bowman Systems, LLC (0) ▼ -Select- ▼
Name *	<input type="text"/>
Title	<input type="text"/>
Phone Number	<input type="text"/>
Email Address	<input type="text"/>
Provider *	Bowman Systems, LLC (0) ▼
Start Date *	04 / 21 / 2018   
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   





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	

Showing 1-1 of 1

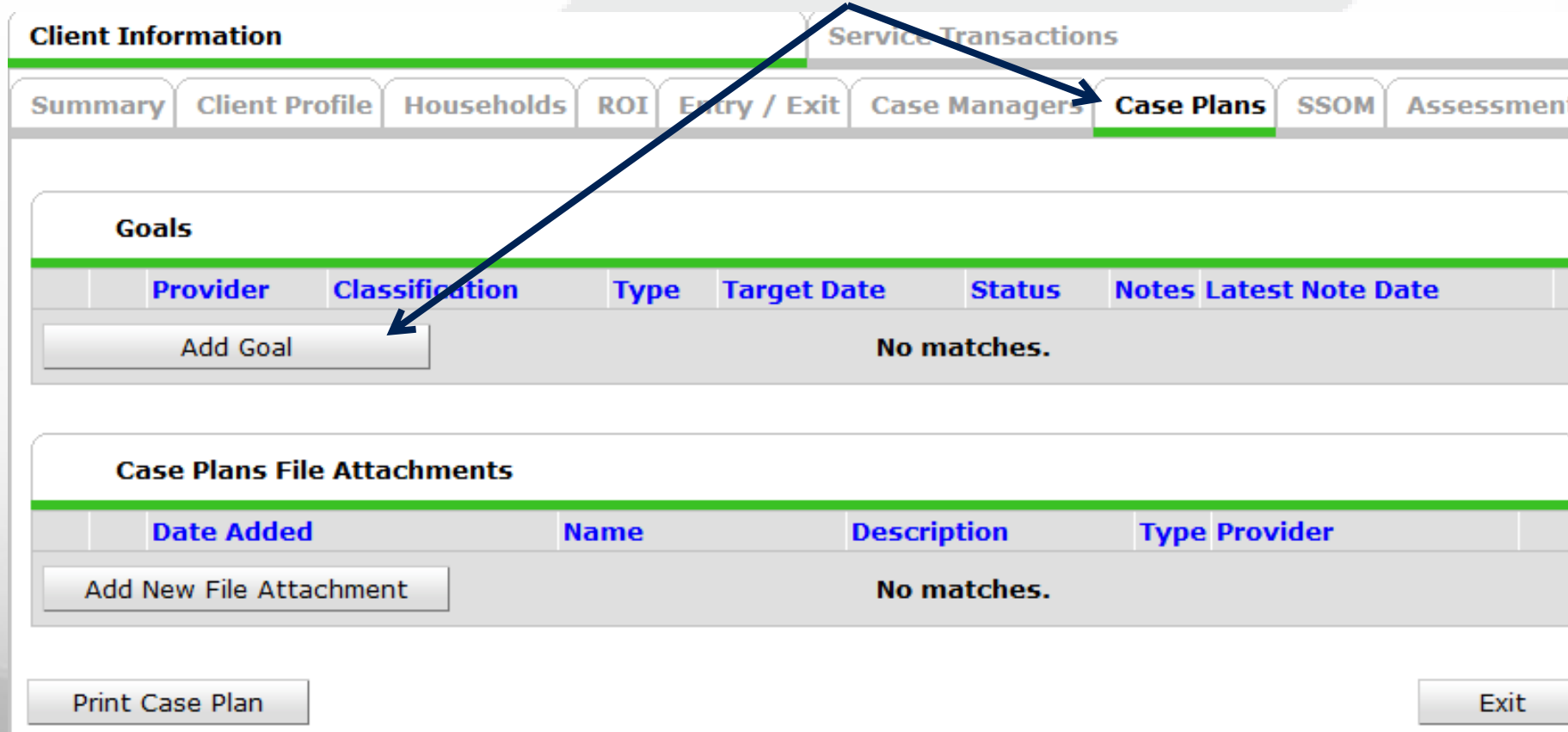
To edit case manager information click on the pencil.
 To delete case manager click on the trash can icon.




 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.



The screenshot shows the 'Client Information' and 'Service Transactions' tabs. The 'Case Plans' tab is selected. Below the tabs, there are sections for 'Goals' and 'Case Plans File Attachments'. The 'Goals' section has a table with columns: Provider, Classification, Type, Target Date, Status, Notes, Latest Note Date. Below the table is an 'Add Goal' button. The 'Case Plans File Attachments' section has a table with columns: Date Added, Name, Description, Type, Provider. Below the table is an 'Add New File Attachment' button. At the bottom, there are 'Print Case Plan' and 'Exit' buttons.

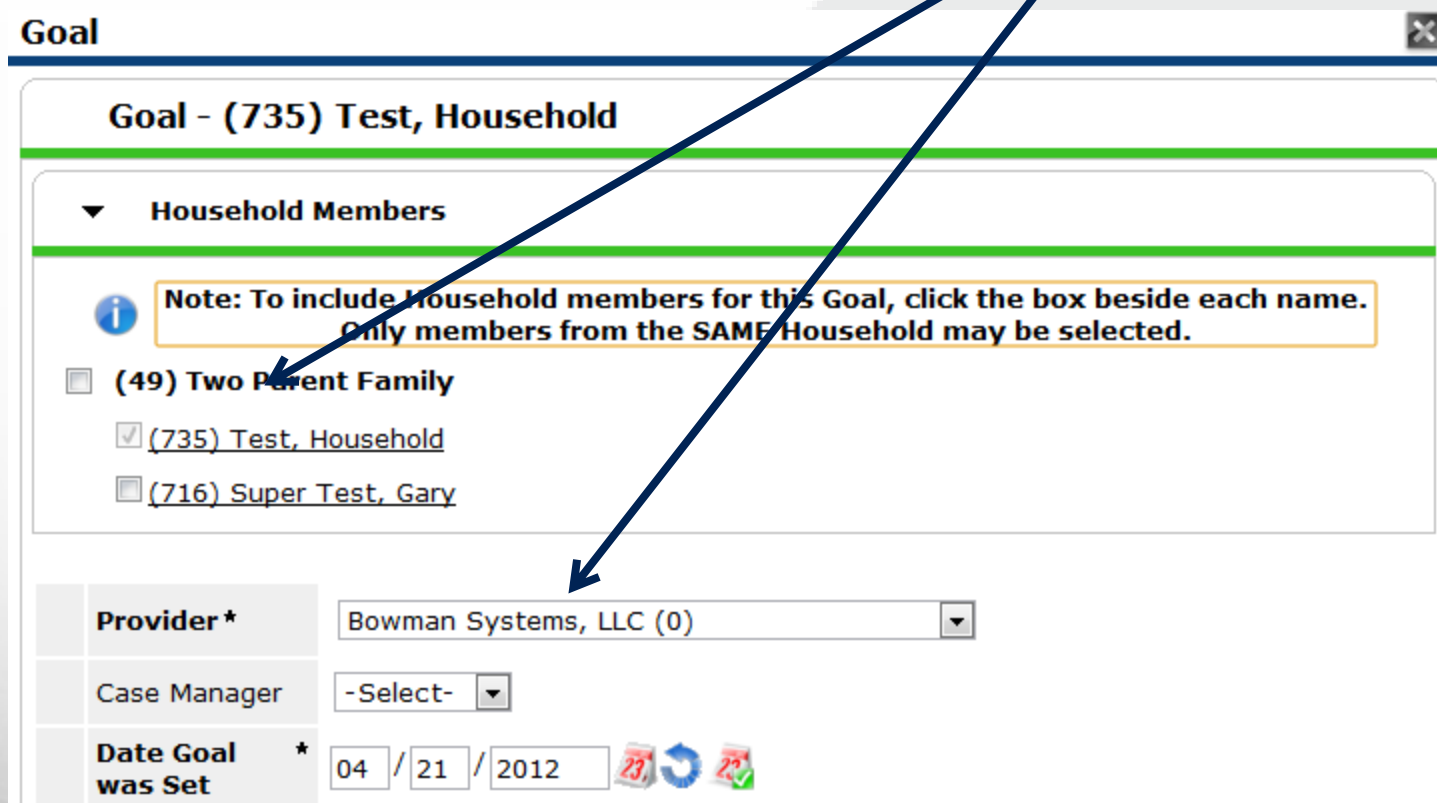
Provider	Classification	Type	Target Date	Status	Notes	Latest Note Date
No matches.						

Date Added	Name	Description	Type	Provider
No matches.				



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.



Goal

Goal - (735) Test, Household

▼ **Household Members**

Note: To include Household members for this Goal, click the box beside each name. Only members from the SAME Household may be selected.

(49) Two Parent Family

(735) Test, Household

(716) Super Test, Gary

Provider * Bowman Systems, LLC (0)

Case Manager -Select-

Date Goal was Set * 04 / 21 / 2012

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.

Case Manager	- Select-
Date Goal was Set *	- Select- case manager

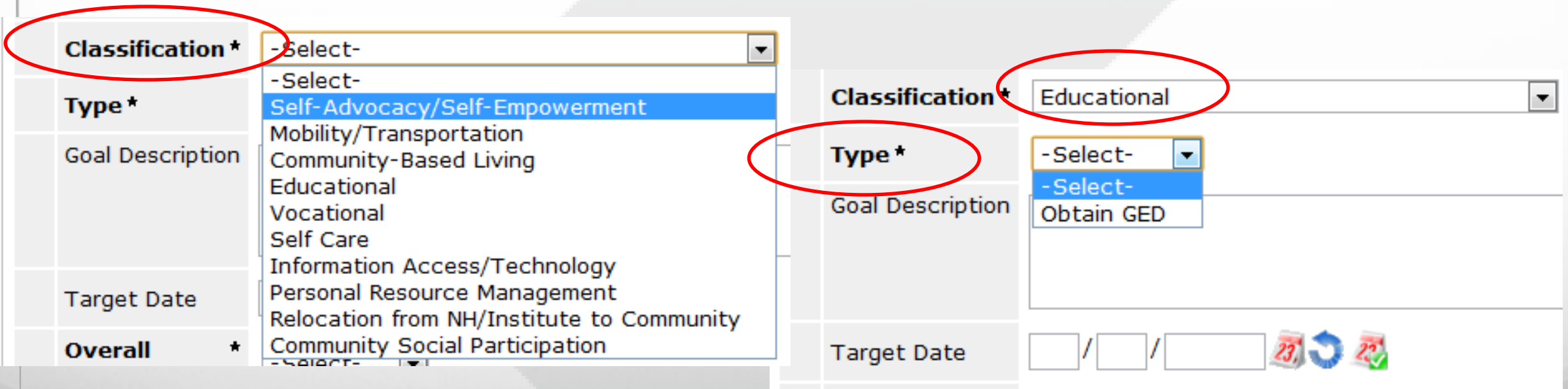
Next enter the “Date Goal was Set”. This can be typed in or entered by using the calendar functions in ServicePoint.

Date Goal was Set *	02 / 09 / 2011			
----------------------------	----------------	--	--	--



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.












Classification *	-Select-
Type *	-Select-
Goal Description	Self-Advocacy/Self-Empowerment
	Mobility/Transportation
	Community-Based Living
	Educational
	Vocational
	Self Care
	Information Access/Technology
	Personal Resource Management
	Relocation from NH/Institute to Community
	Community Social Participation
	-SELECT-

Classification *	Educational
Type *	-Select-
Goal Description	Obtain GED
Target Date	□ / □ / □



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	<input type="text"/>	
Target Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	  
Overall Status *	- Select- 	
If Closed, Outcome	- Select- 	<input type="text"/> / <input type="text"/> / <input type="text"/>   
If Partially Complete, Percent Complete	- Select- 	













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).

Target Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   	1
Overall Status *	-Select- 	2
If Closed, Outcome	-Select-  <input type="text"/> / <input type="text"/> / <input type="text"/>   	3
If Partially Complete, Percent Complete	-Select- 	4

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	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Follow Up User	<input type="text" value="Bowman Systems, LLC (0)"/>  <input type="text" value="-Select-"/> 
Follow Up Made	<input type="text" value="-Select-"/> 
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Outcome at Follow Up	<input type="text" value="-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)	<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
	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



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.

Goal

Goal - (Test, Just A 2)

Household Members

Note: To include Household members in this Goal, click the box beside each name. Only members from the SAME Household may be selected.

Household #1 Members: [ZZ000000001, Anonymous](#)

Provider *	Professional Services Training Provider (1)	<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
Case Manager	-Select-	
Date Goal was Set *	02 / 01 / 2011	<input type="button" value="23"/> <input type="button" value="23"/>
Classification *	Education	
Type *	Get GED	
Target Date	03 / 15 / 2011	<input type="button" value="23"/> <input type="button" value="23"/>
Overall Status *	-Select-	
If Closed, Outcome	-Select-	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="button" value="23"/> <input type="button" value="23"/>
If Partially Complete, Percent Complete	50%	

Projected Follow Up Date	04 / 15 / 2011	<input type="button" value="23"/> <input type="button" value="23"/>
Follow Up User	Professional Services Training Provider (1) case manager	<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
Follow Up Made	-Select-	
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="button" value="23"/> <input type="button" value="23"/>
Outcome at Follow Up	-Select-	

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
No matches.				

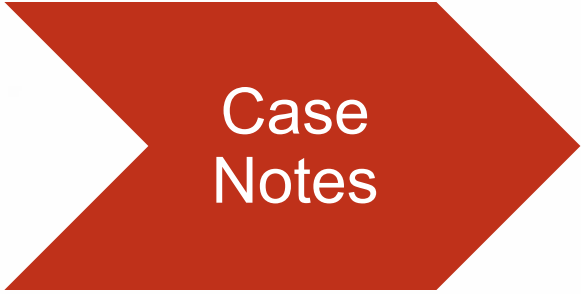
Action Steps Planned

Action Step	Target Date	Status	Outcome
No matches.			

Service Items for this Goal

Date Set	Created By	Need Type	Status	Outcome
No matches.				




 Case
Notes

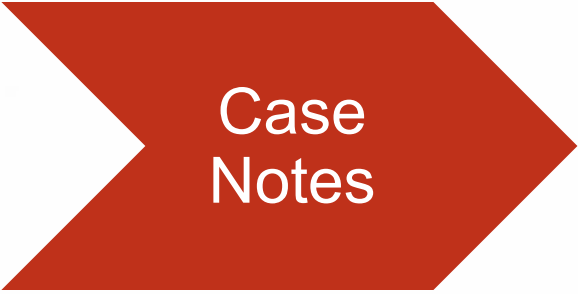
Add Case Notes

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.		



**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.

Case Note - (735) Test, Household**▼ Household Members**

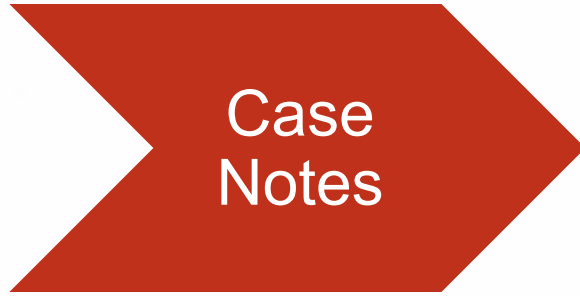
No Household Members were originally associated.

Provider *

Bowman Systems, LLC (0) ▼

Case Manager

-Select- ▼



Case Note - (735) Test, Household

▼ Household Members

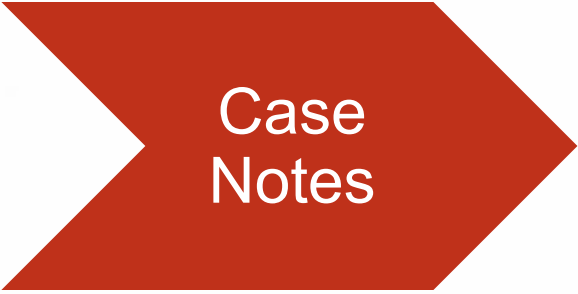
No Household Members were originally associated.

Provider *	Bowman Systems, LLC (0)
Case Manager	-Select-
Note Date *	04 / 21 / 2012
Note *	

Save Case Note Cancel





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.





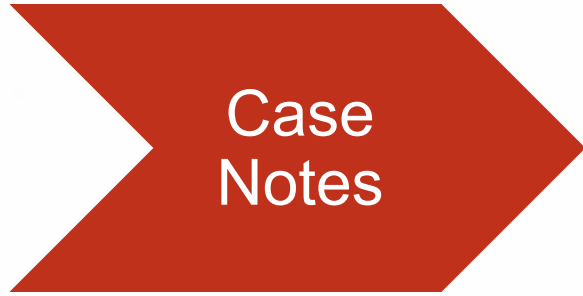
Case Notes

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		04/21/2012	
<input type="button" value="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.





The Notes column will indicate how many notes there are.

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

Add Goal Showing 1-1 of 1

The paperclip icon will allow you to attach a document to your note. To attach a document start by clicking the paperclip icon. In the

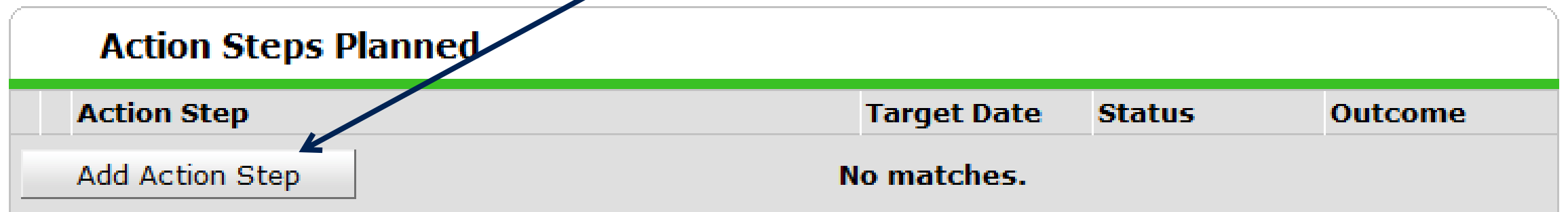
next pop up window click “Add New File Attachment” and in the final pop up select the file to upload and click the “Upload” button.

The screenshot shows the 'Goal File Attachments' window with a table containing one row: 'Add New File Attachment' and 'No matches.'. Below it is the 'Upload Attachment' dialog box with fields for 'Name *' (with a 'Choose File' button and 'No file chosen' text), 'Description', and an 'Upload' button circled in red.



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.



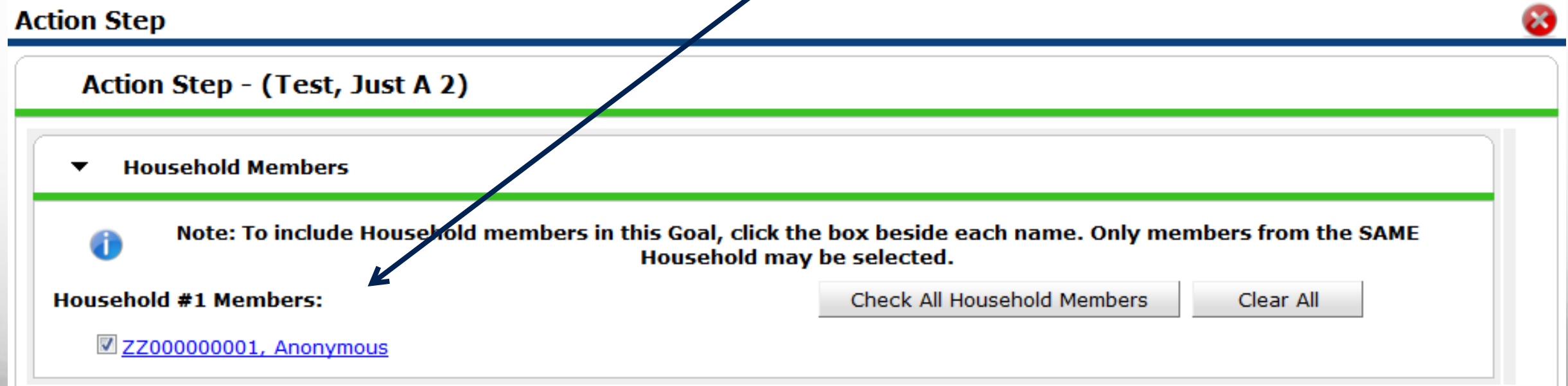
Action Steps Planned			
Action Step	Target Date	Status	Outcome
<input type="button" value="Add Action Step"/>	No matches.		





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.



Action Step

Action Step - (Test, Just A 2)

▼ **Household Members**










Note: To include Household members in this Goal, click the box beside each name. Only members from the SAME Household may be selected.

Household #1 Members:

[ZZ000000001, Anonymous](#)


















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.

Provider *	<input type="text" value="Bowman Systems, LLC (0)"/>
Date Action Step was set *	<input type="text" value="04"/> / <input type="text" value="21"/> / <input type="text" value="2012"/>   
Action Step *	<div style="border: 1px solid #ccc; padding: 10px; text-align: center;"><i>Action Step Entered Here</i></div>
Target Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Overall Status *	<input type="text" value="-Select-"/>
If Closed, Outcome	<input type="text" value="-Select-"/> <input type="text"/> / <input type="text"/> / <input type="text"/>   





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.

Provider *	Bowman Systems, LLC (0)
Date Action Step was set *	04 / 21 / 2012   
Action Step *	<div style="border: 1px solid gray; height: 100px;"></div>
Target Date	/ /   
Overall Status *	-Select-
If Closed, Outcome	-Select- / /   
Projected Follow Up Date	/ /   
Follow Up User	Bowman Systems, LLC (0) -Select-
Follow Up Made	-Select-
Completed Follow Up Date	/ /   
Outcome at Follow Up	-Select-







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	

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

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”.

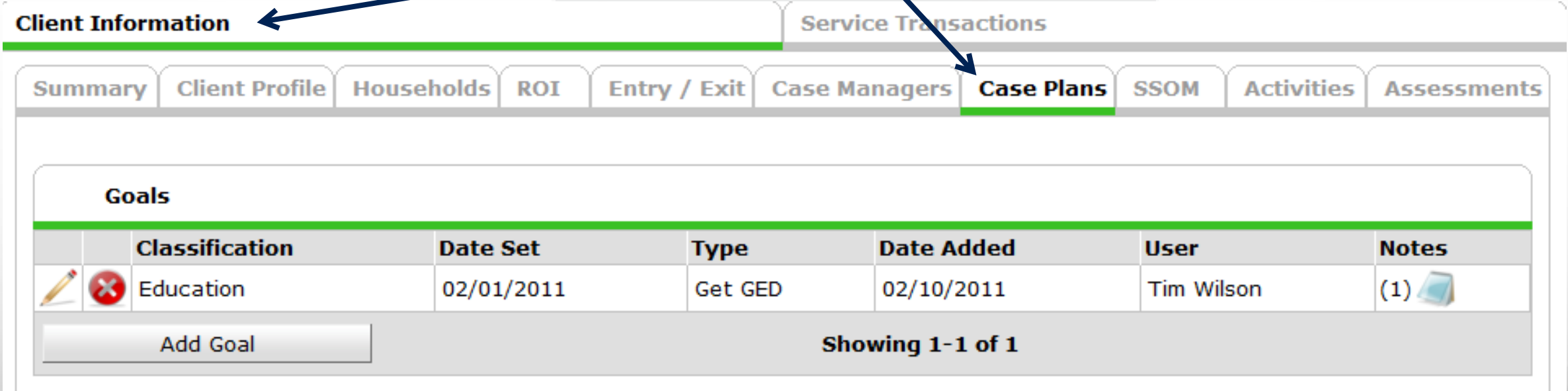
Service Items for this Goal				
Date Set	Created By	Need Type	Status	Outcome
Add Service		No matches.		








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.



The screenshot shows the software interface with the 'Service Transactions' tab selected. The 'Client Information' tab is also visible. Below the tabs, the 'Case Plans' sub-tab is selected, displaying a table of goals.

Goals							
	Classification	Date Set	Type	Date Added	User	Notes	
 	Education	02/01/2011	Get GED	02/10/2011	Tim Wilson	(1) 	

Buttons: Add Goal, Showing 1-1 of 1






Service Transactions

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

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | Entry / Exit | Case Managers | **Case Plans** | SSOM | Activities | Assessments

Goals

	Classification	Date Set	Type	Date Added	User	Notes
 	Education	02/01/2011	Get GED	02/10/2011	Tim Wilson	(1) 



Showing 1-1 of 1



Service Transactions

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

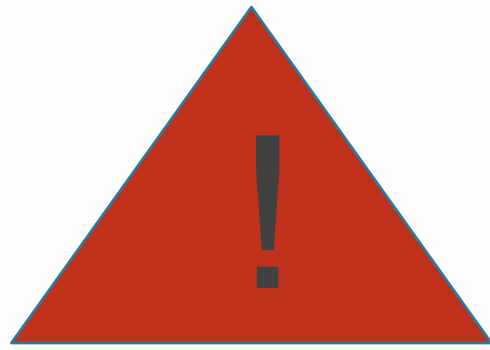
Service Items for this Goal

	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)





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

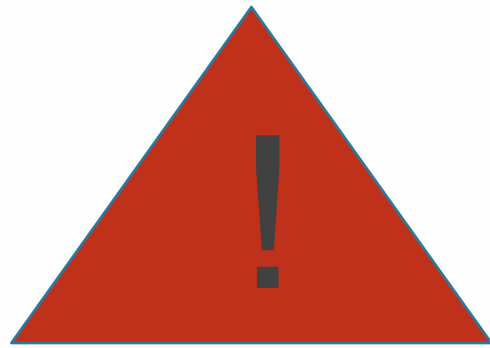
Print

Save Goal

Save & Exit

Exit





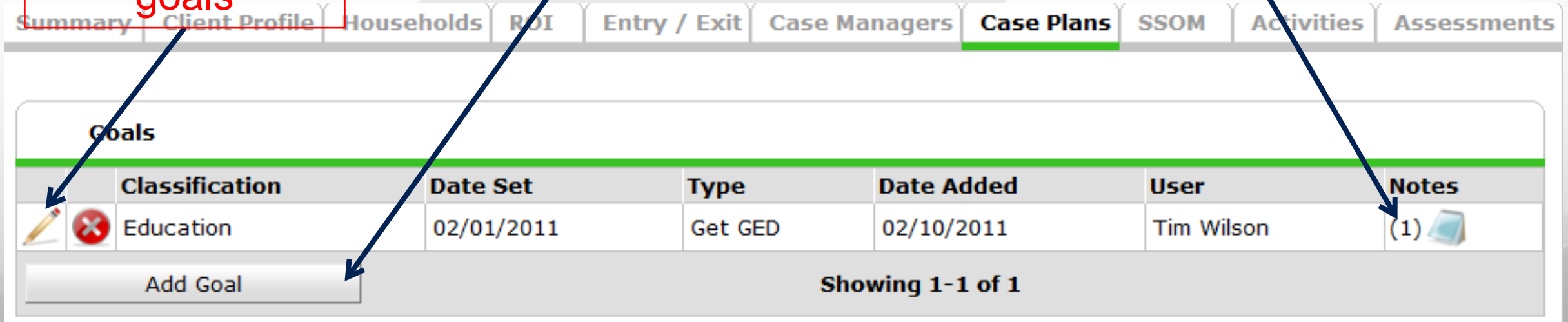
For Your Information

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



Summary Client Profile Households ROI Entry / Exit Case Managers **Case Plans** SSOM Activities Assessments

Goals						
	Classification	Date Set	Type	Date Added	User	Notes
	 Education	02/01/2011	Get GED	02/10/2011	Tim Wilson	(1) 

Add Goal

Showing 1-1 of 1



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.







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	

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	

Showing 1-1 of 1





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

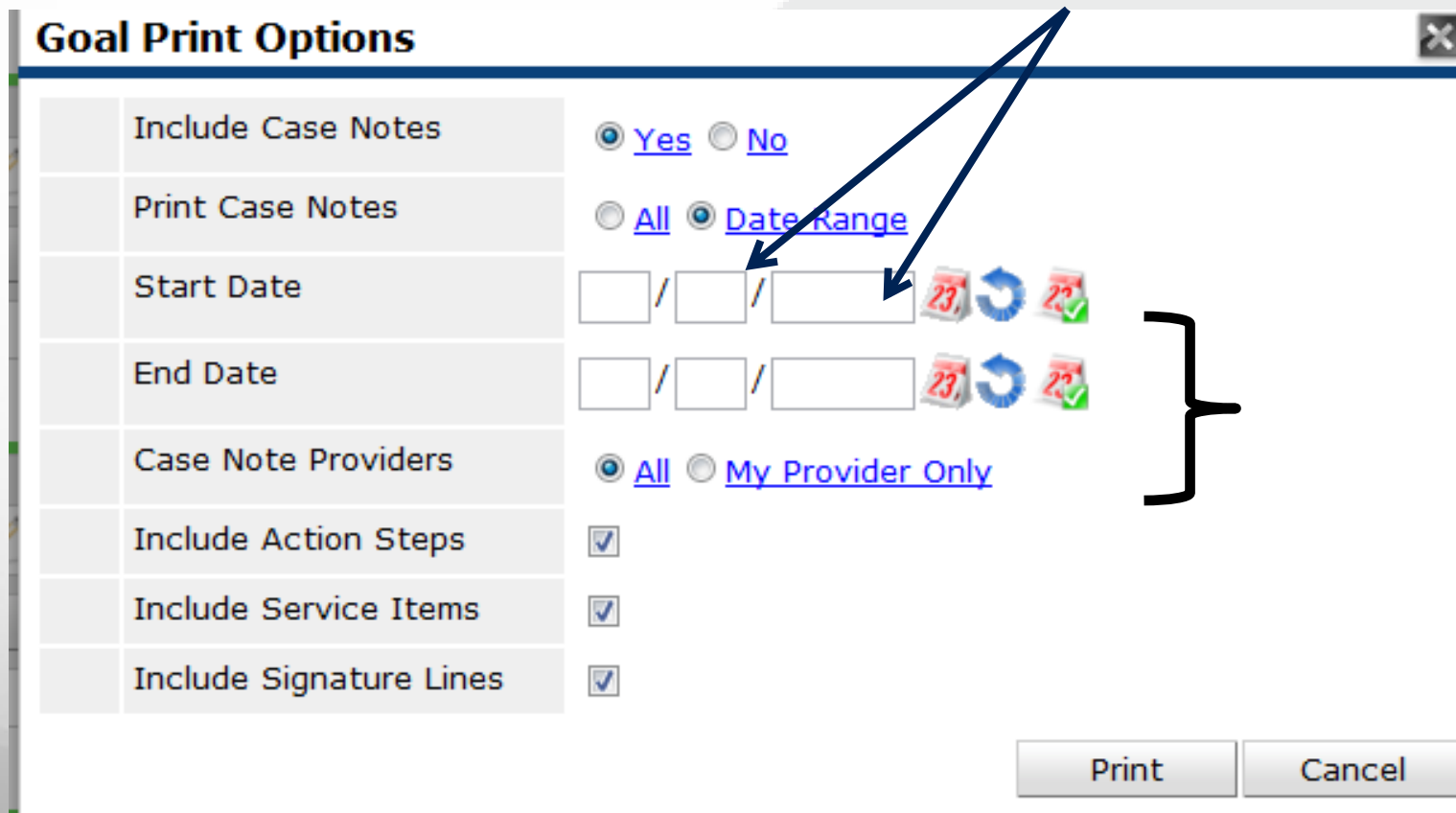
Goal Print Options ✕







Include Case Notes	<input checked="" type="radio"/> Yes <input type="radio"/> No
Print Case Notes	<input type="radio"/> All <input checked="" type="radio"/> Date Range
Start Date	<input type="text"/> / <input type="text"/> / <input type="text"/> 📅 ↻ 📅
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/> 📅 ↻ 📅
Case Note Providers	<input checked="" type="radio"/> All <input type="radio"/> My Provider Only
Include Action Steps	<input checked="" type="checkbox"/>
Include Service Items	<input checked="" type="checkbox"/>
Include Signature Lines	<input checked="" type="checkbox"/>



 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.

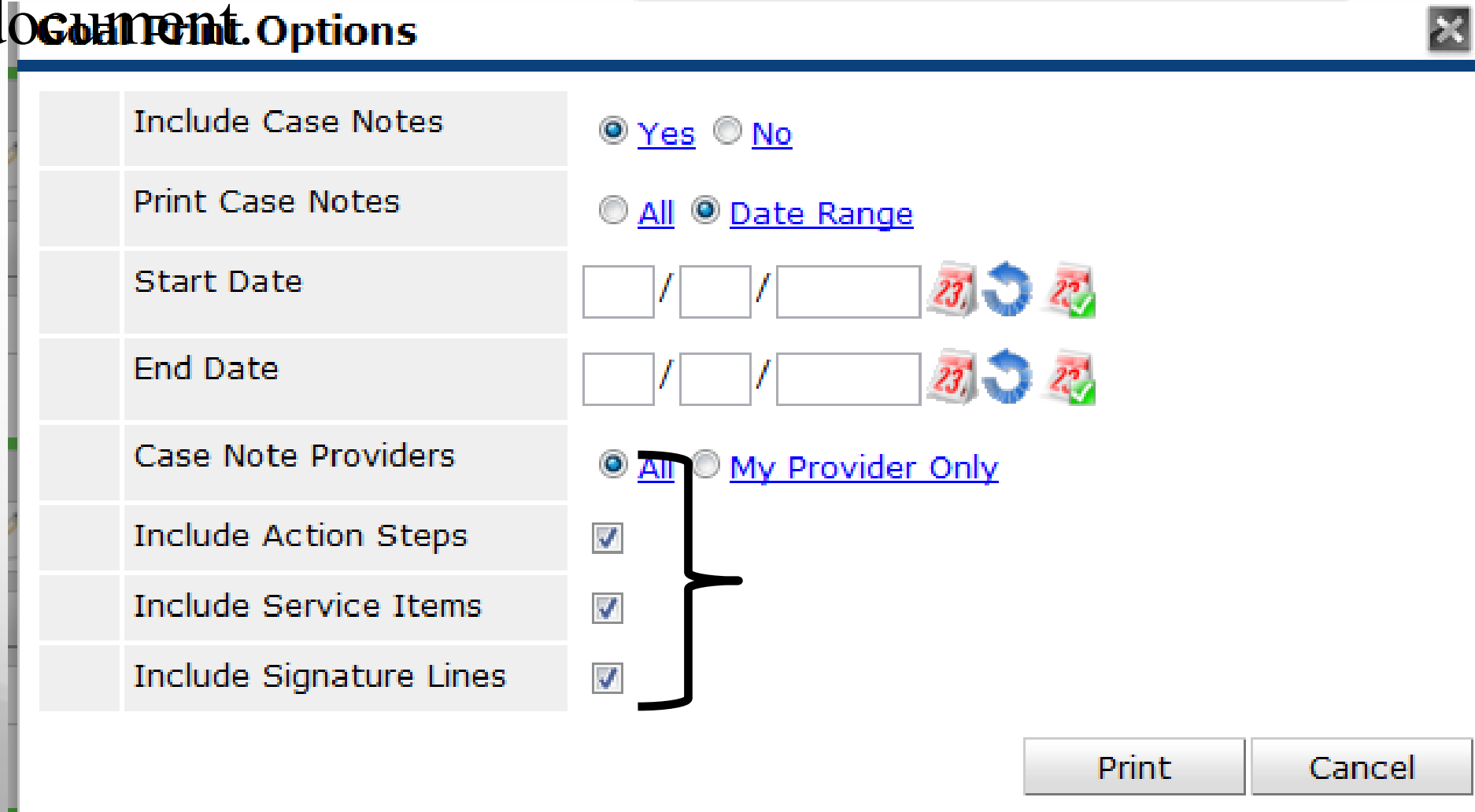








Goal Print Options	
Include Case Notes	<input checked="" type="radio"/> Yes <input type="radio"/> No
Print Case Notes	<input type="radio"/> All <input checked="" type="radio"/> Date Range
Start Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Case Note Providers	<input checked="" type="radio"/> All <input type="radio"/> My Provider Only
Include Action Steps	<input checked="" type="checkbox"/>
Include Service Items	<input checked="" type="checkbox"/>
Include Signature Lines	<input checked="" type="checkbox"/>
<input type="button" value="Print"/> <input type="button" value="Cancel"/>	





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.



Include Case Notes	<input checked="" type="radio"/> Yes <input type="radio"/> No
Print Case Notes	<input type="radio"/> All <input checked="" type="radio"/> Date Range
Start Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Case Note Providers	<input checked="" type="radio"/> All <input type="radio"/> My Provider Only
Include Action Steps	<input checked="" type="checkbox"/>
Include Service Items	<input checked="" type="checkbox"/>
Include Signature Lines	<input checked="" type="checkbox"/>

Print Cancel








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.

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | Entry | Exit | Case Managers | **Case Plans** | SSOM | Activities | Assessments

Goals

	Classification	Date Set	Type	Date Added	User	Notes
 	Education	02/01/2011	Get GED	02/10/2011	Tim Wilson	(1) 

Add Goal | Showing 1-1 of 1

File Attachments

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







Print Case Plan | Exit





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

Case Plan Print Options ✖

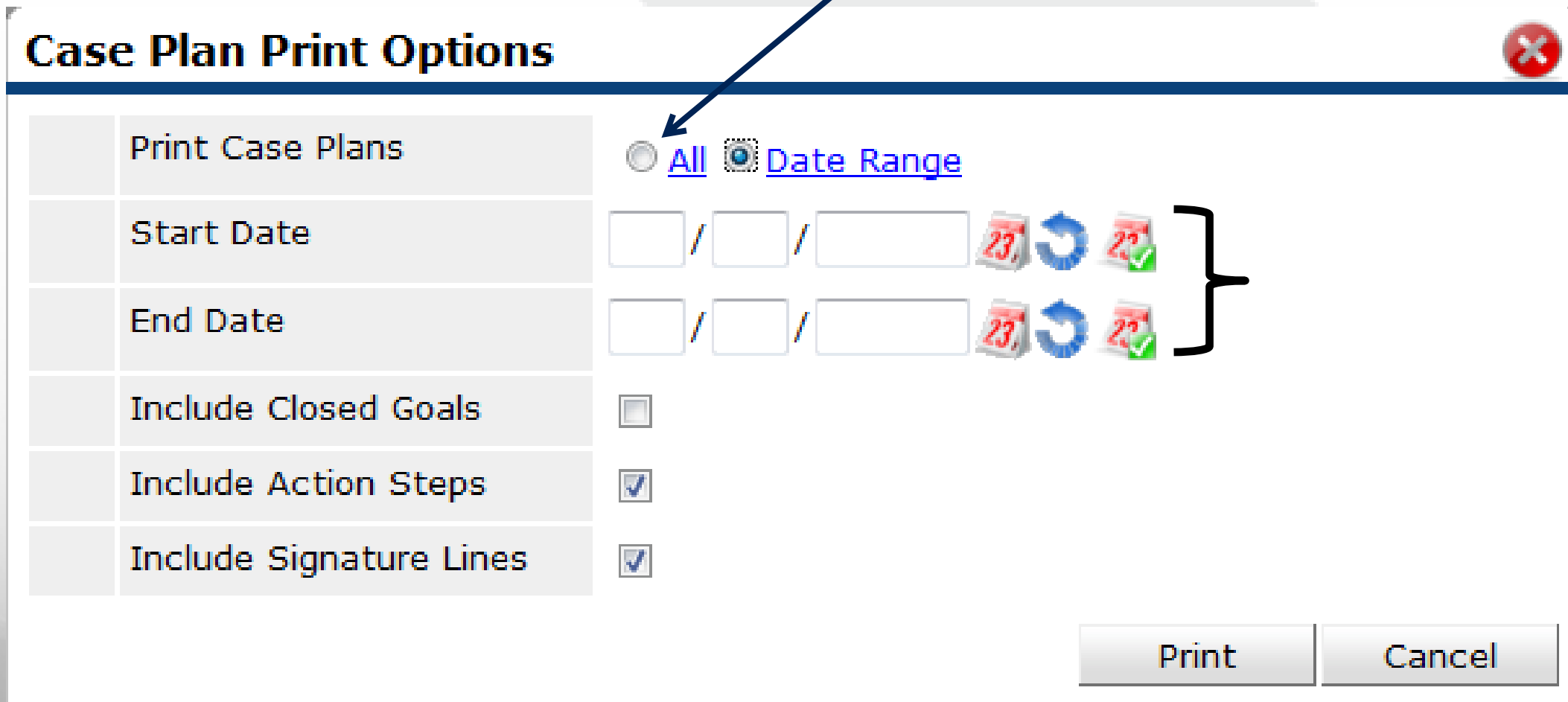
Print Case Plans	<input type="radio"/> All <input checked="" type="radio"/> <u>Date Range</u>
Start Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Include Closed Goals	<input type="checkbox"/>
Include Action Steps	<input checked="" type="checkbox"/>
Include Signature Lines	<input checked="" type="checkbox"/>











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	<input type="radio"/> All <input checked="" type="radio"/> Date Range
Start Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Include Closed Goals	<input type="checkbox"/>
Include Action Steps	<input checked="" type="checkbox"/>
Include Signature Lines	<input checked="" type="checkbox"/>

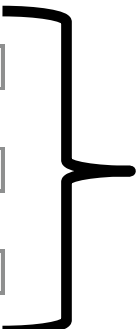
Note: A blue arrow points from the text above to the 'Date Range' radio button. A black bracket groups the Start Date and End Date fields.



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.

Case Plan Print Options

Print Case Plans	<input type="radio"/> All <input checked="" type="radio"/> Date Range
Start Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Include Closed Goals	<input type="checkbox"/>
Include Action Steps	<input checked="" type="checkbox"/>
Include Signature Lines	<input checked="" type="checkbox"/>

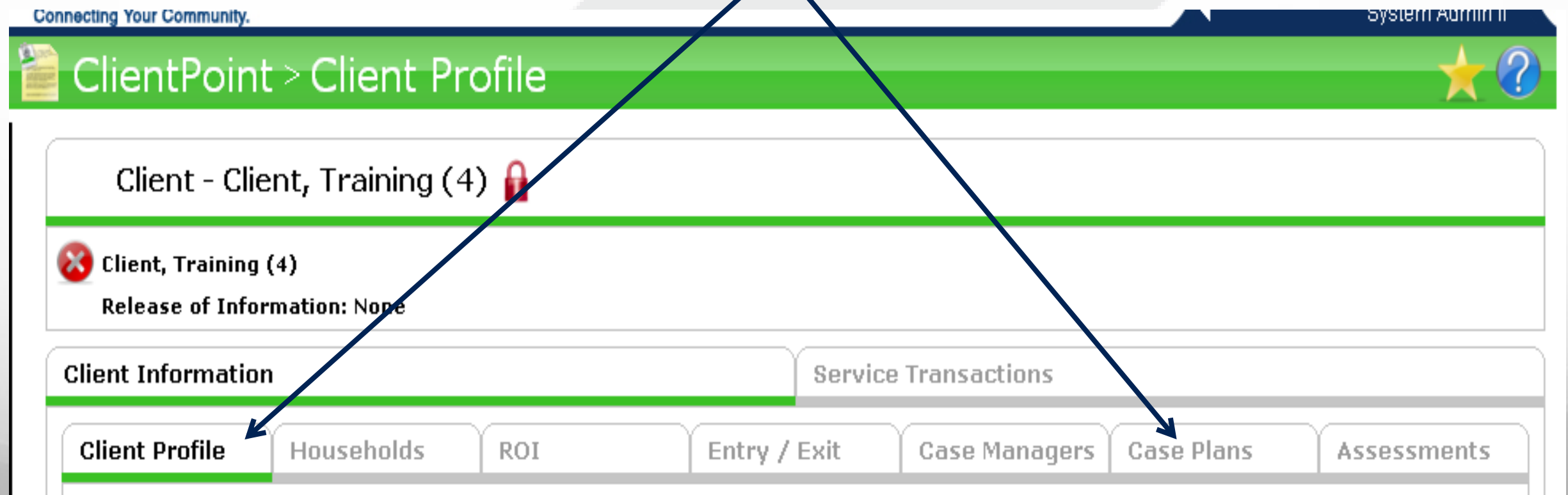




File
Attachments


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.



Connecting Your Community. System Admin II

ClientPoint > Client Profile

Client - Client, Training (4) 

 Client, Training (4)
Release of Information: None

Client Information Service Transactions

Client Profile Households ROI Entry / Exit Case Managers Case Plans Assessments

The screenshot shows a software interface with a green header bar. Below the header, there are several sections. The first section is titled "Client - Client, Training (4)" and has a red lock icon. The second section is titled "Client, Training (4)" and has a red error icon and the text "Release of Information: None". Below these sections are two tabs: "Client Information" and "Service Transactions". The "Client Information" tab is active and shows a row of sub-tabs: "Client Profile", "Households", "ROI", "Entry / Exit", "Case Managers", "Case Plans", and "Assessments". The "Client Profile" sub-tab is selected. Two blue arrows point from the text above to the "Client Profile" sub-tab and the "Case Plans" sub-tab.

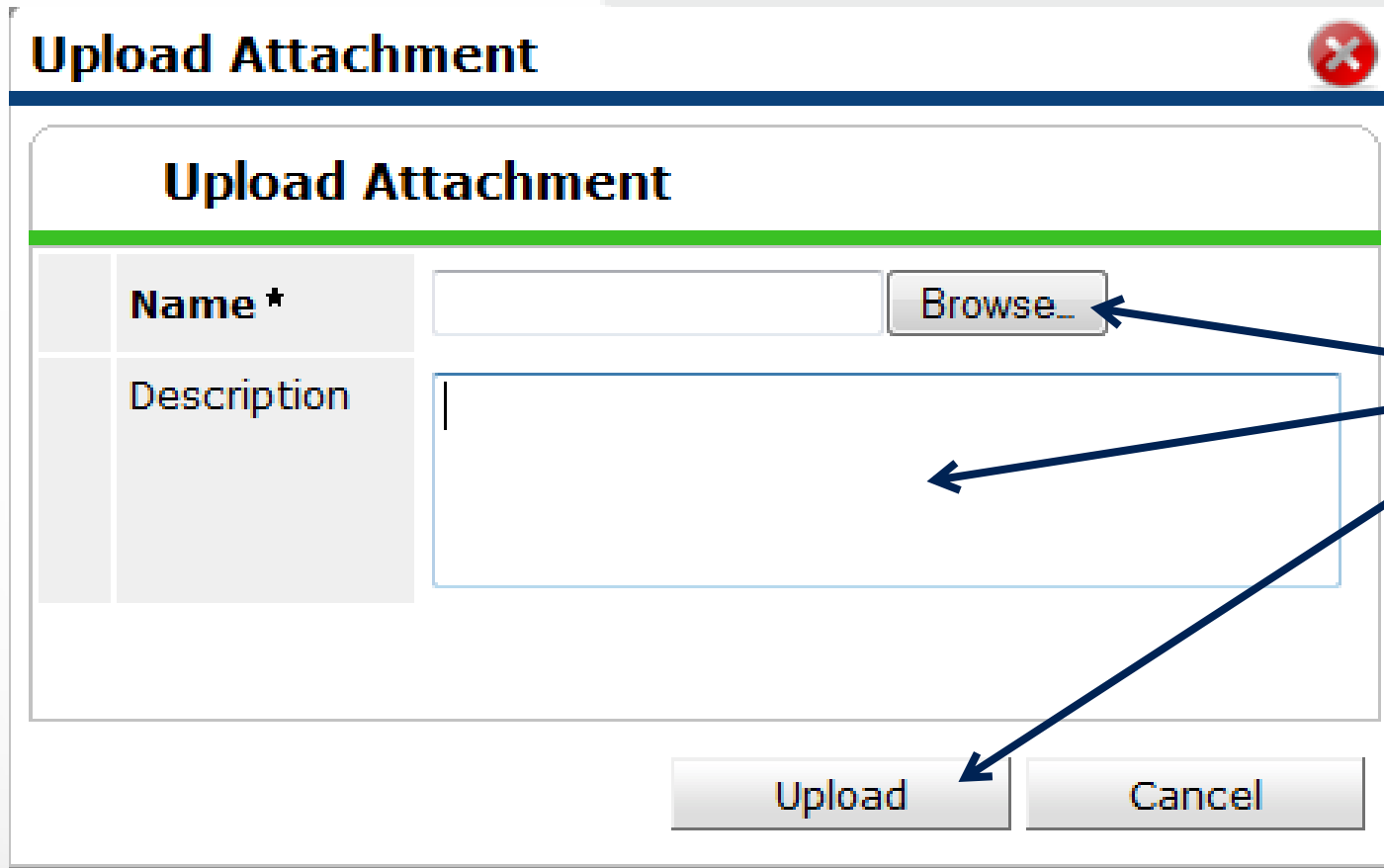


Once on the “Client Profile” or “Case Plans” tab, scroll to the bottom for the “File Attachments” section. There click on the “Add New File Attachment” button.

File Attachments

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








Upload Attachment	
Name *	<input type="text"/> <input type="button" value="Browse..."/>
Description	<input type="text"/>
<input type="button" value="Upload"/> <input type="button" value="Cancel"/>	

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.





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

