Completing a Goal Follow-up

Follow-up dates can be set when a client goal is created initially, or by editing the goal at a later date. Once a follow-up date has been set, it will be listed on the *ServicePoint* **Home** screen.

Complete a Follow-up from the Home Screen

1. Click the **Home** tab. The screen will refresh and display the *ServicePoint* **Home** screen. (See Figure 1-35)

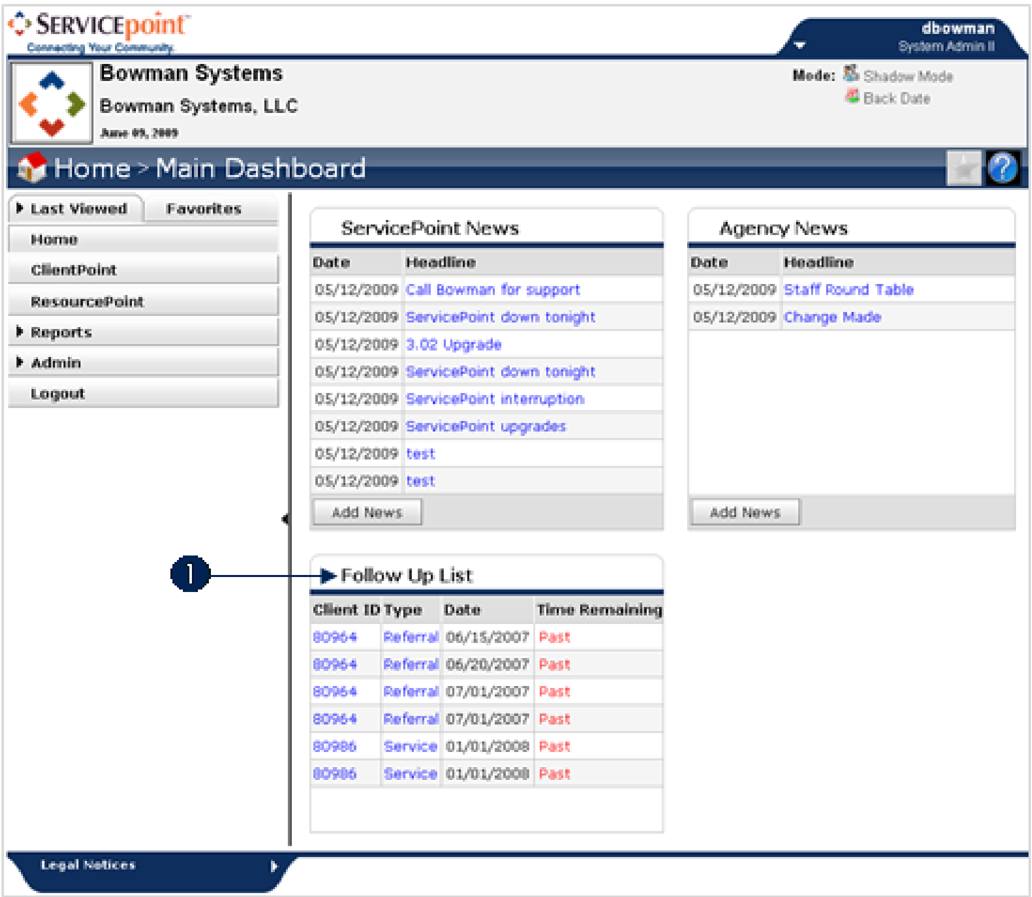
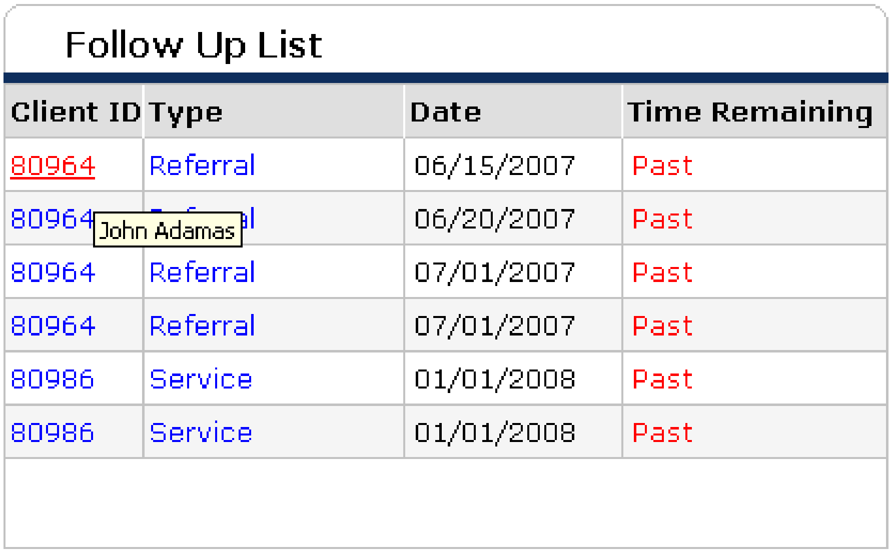


Figure 1-35

2. At the bottom left of the screen there is a **Followup List**. **(1)** This is a list of follow-up dates that have been set for clients by *this* user. The left column is a list of links that read **Client ID**. (The name of the client isn't listed to prevent unauthorized people from seeing the name, which is in compliance with HIPAA regulations.) Move your mouse over the **Client ID** hyperlink to view the name of the client. This allows you to see the name of the client who has a follow up scheduled (See Figure 1-36).

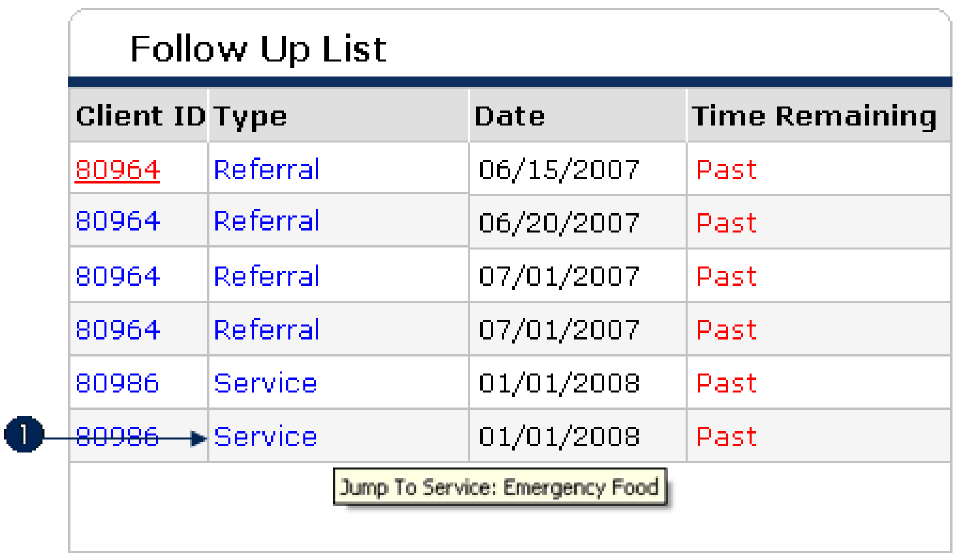


Follow Up List

Client ID	Type	Date	Time Remaining
80964	Referral	06/15/2007	Past
80964	Referral	06/20/2007	Past
80964	Referral	07/01/2007	Past
80964	Referral	07/01/2007	Past
80986	Service	01/01/2008	Past
80986	Service	01/01/2008	Past

Figure 1-36

3. Similarly, if you move your mouse over the **Referral** link, you will be able to view the **Referral** title. **(1)** (See Figure 1-37)



Follow Up List

Client ID	Type	Date	Time Remaining
80964	Referral	06/15/2007	Past
80964	Referral	06/20/2007	Past
80964	Referral	07/01/2007	Past
80964	Referral	07/01/2007	Past
80986	Service	01/01/2008	Past
80986	Service	01/01/2008	Past

Figure 1-37

4. The **Projected Follow-up Dates** are listed in the **Date** column, and the **Time Remaining** column indicates how much time is left from the current date until the Projected Follow-up Date. If the Projected Follow-up Date has already passed, then the **Time Remaining** will be noted in red and will say "**Past**."

5. Click the **Referral Type** to move to the Goal screen. **(1)** (See Figure 1-38)

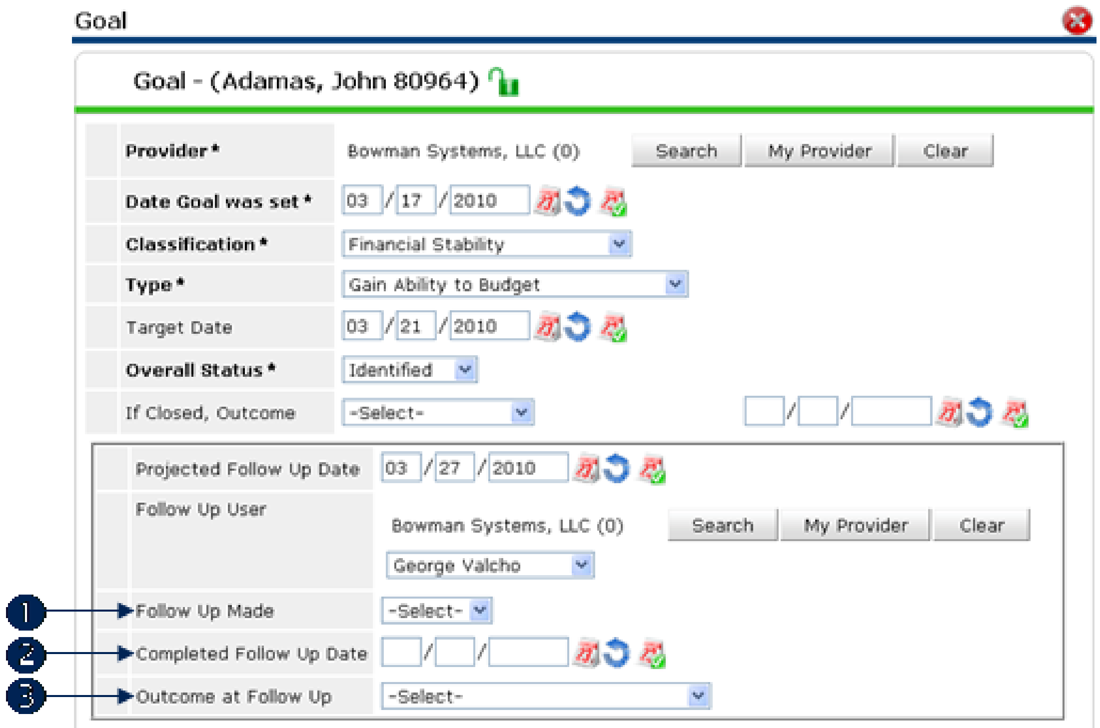


Figure 1-38

6. Locate the **Follow Up** section.

7. If a follow up was made, use the **Follow Up Made** picklist and select **Yes**. **(1)**

8. Enter the **Completed Follow Up Date** in mm/dd/yyyy format. **(2)**

9. Select the status of the goal at the time the follow-up was made from the **Outcome at Followup** picklist **(3)**

10. Click **Save Goal** to save the changes and remain on the current screen. Click **Save & Exit** to retain the changes. The screen will refresh and display the **Case Plans** screen.

Complete a Follow-up from the Case Plans Screen

1. Using *ClientPoint*, find a client and click the name to pull up the **Client Profile** screen. (See Figure 1-39)

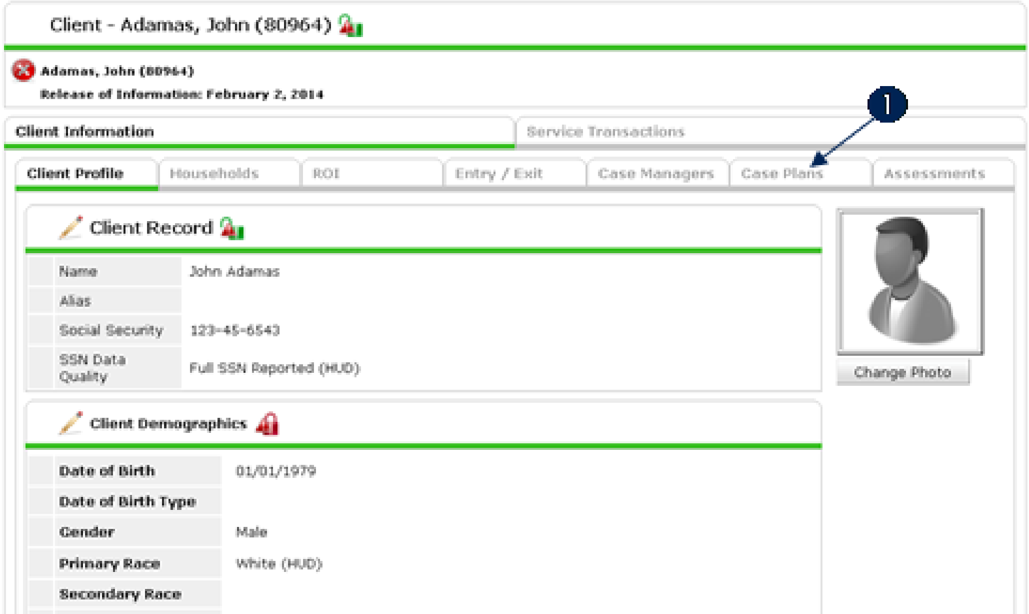


Figure 1-39

2. From the Client Profile screen, click the **Case Plans** link. **(1)** The screen will refresh and display a list of current goals. (See Figure 1-40)

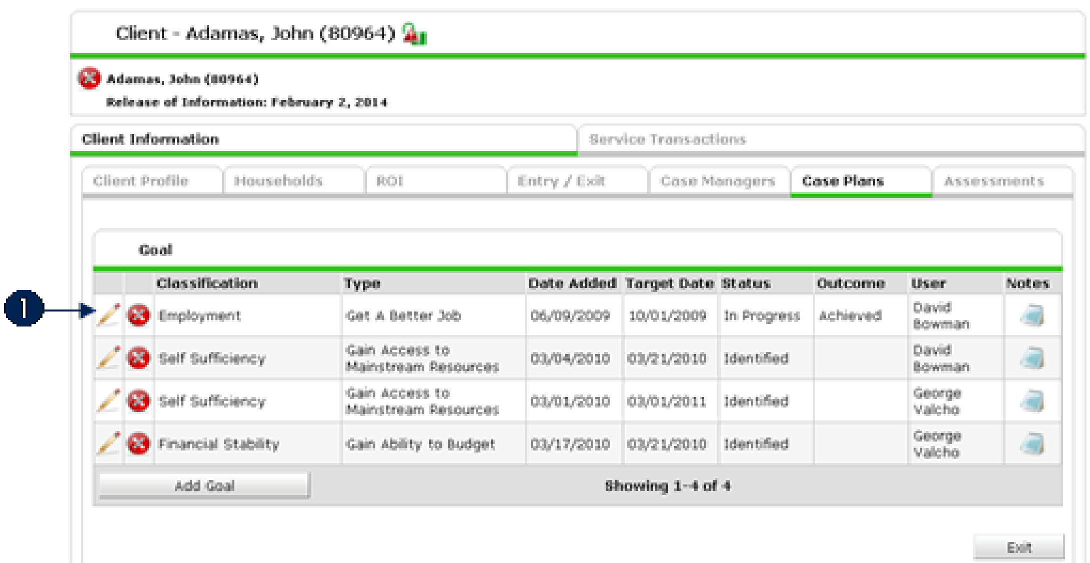


Figure 1-40

3. Each listed **Goal** includes its basic information. This allows you to quickly identify the goal you wish to manage and view its **Target Date**.

4. Click the **pencil icon** to the left of the goal title. **(1)** The screen will refresh and display the goal information. (See Figure 1-41)

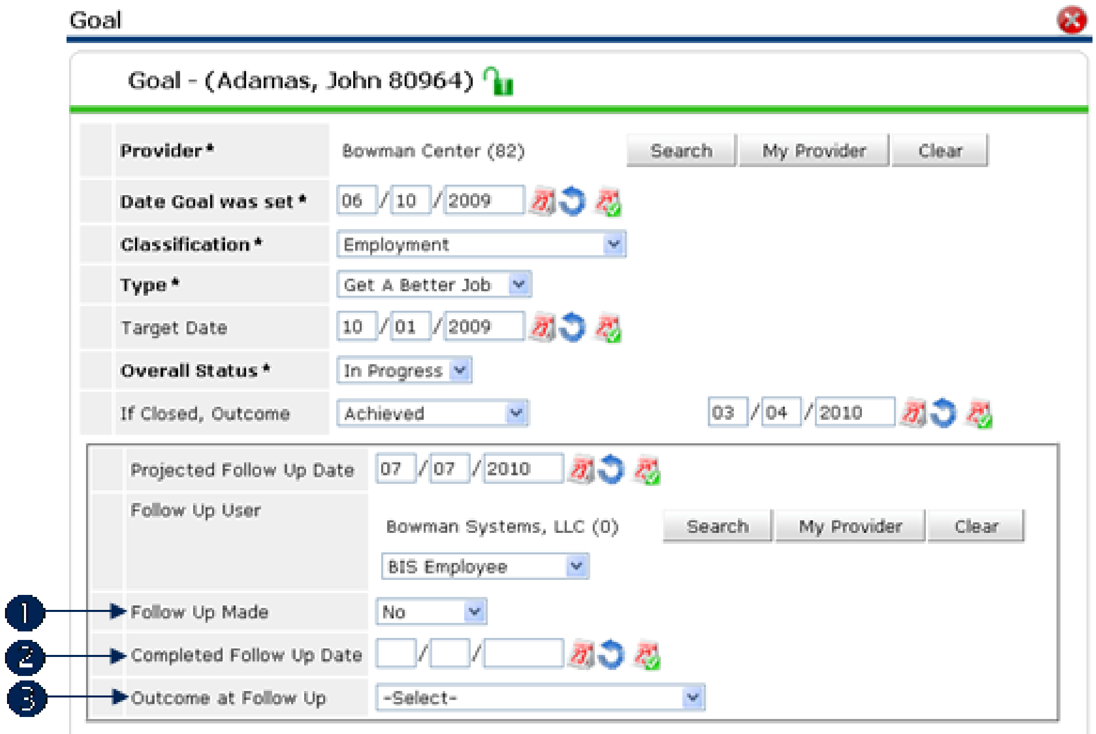


Figure 1-41

5. Locate the **Follow Up** section.

6. If a follow up was made, use the **Follow Up Made** picklist and select **Yes**. **(1)**

7. Enter the **Completed Follow Up Date** in mm/dd/yyyy format. **(2)**

8. Select the status of the goal at the time the follow-up was made from the **Outcome at Followup** picklist **(3)**

9. Click **Save Goal** to save the changes and remain on the current screen. Click **Save & Exit** to retain the changes. The screen will refresh and display the **Case Plans** screen.