

## COMPLETING A GOAL

1. Using *ClientPoint*, find a client and click the name to pull up the **Client Profile** screen. (See Figure 1-52)

Client - Adamas, John (80964)

Adamas, John (80964)  
Release of Information: February 2, 2014

Client Information | Service Transactions

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

Client Record

Name	John Adamas
Alias	
Social Security	123-45-6543
SSN Data Quality	Full SSN Reported (HUD)

Client Demographics

Date of Birth	01/01/1979
Date of Birth Type	
Gender	Male
Primary Race	White (HUD)
Secondary Race	

Change Photo

Figure 1-52

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 1-53)

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Goal

	Classification	Type	Date Added	Target Date	Status	Outcome	User	Notes
✎	Employment	Get A Better Job	06/09/2009	10/01/2009	In Progress	Achieved	David Bowman	
✎	Self Sufficiency	Gain Access to Mainstream Resources	03/04/2010	03/21/2010	Identified		David Bowman	
✎	Self Sufficiency	Gain Access to Mainstream Resources	03/01/2010	03/01/2011	Identified		George Valcho	
✎	Financial Stability	Gain Ability to Budget	03/17/2010	03/21/2010	Identified		George Valcho	

Add Goal

Showing 1-4 of 4

Exit

Figure 1-53

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 1-54)

The screenshot shows a web form titled "Goal" for user "Adamas, John 80964". The form contains several sections:

- Provider\***: Bowman Center (82) with search, "My Provider", and "Clear" buttons.
- Date Goal was set\***: 06 / 10 / 2009 with refresh, undo, and redo icons.
- Classification\***: Employment (dropdown).
- Type\***: Get A Better Job (dropdown).
- Target Date**: 10 / 01 / 2009 with refresh, undo, and redo icons.
- Overall Status\***: In Progress (dropdown). Callout box 1 points to this field.
- If Closed, Outcome**: Achieved (dropdown). Callout box 2 points to this field.
- Projected Follow Up Date**: 07 / 07 / 2010 with refresh, undo, and redo icons.
- Follow Up User**: Bowman Systems, LLC (0) with search, "My Provider", and "Clear" buttons. Below it is a dropdown for "BIS Employee".
- Follow Up Made**: No (dropdown).
- Completed Follow Up Date**: Empty date field with refresh, undo, and redo icons.
- Outcome at Follow Up**: -Select- (dropdown).

Callout box 3 points to a date field containing "03 / 04 / 2010" with refresh, undo, and redo icons.

**Figure 1-54**

5. Select the **Overall Status** of the goal from the picklist. **(1)** Choose "Closed" if you are closing the goal.
6. Choose an option from the **If "Closed," Outcome** picklist. **(2)**
7. Enter the **Date** on which the goal was completed in mm/dd/yyyy format. **(3)**
8. 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.