COMPLETING AN ACTION STEP

1. Using *ClientPoint*, find a client and click the name to pull up the **Client Profile** screen. (See Figure 1-48)

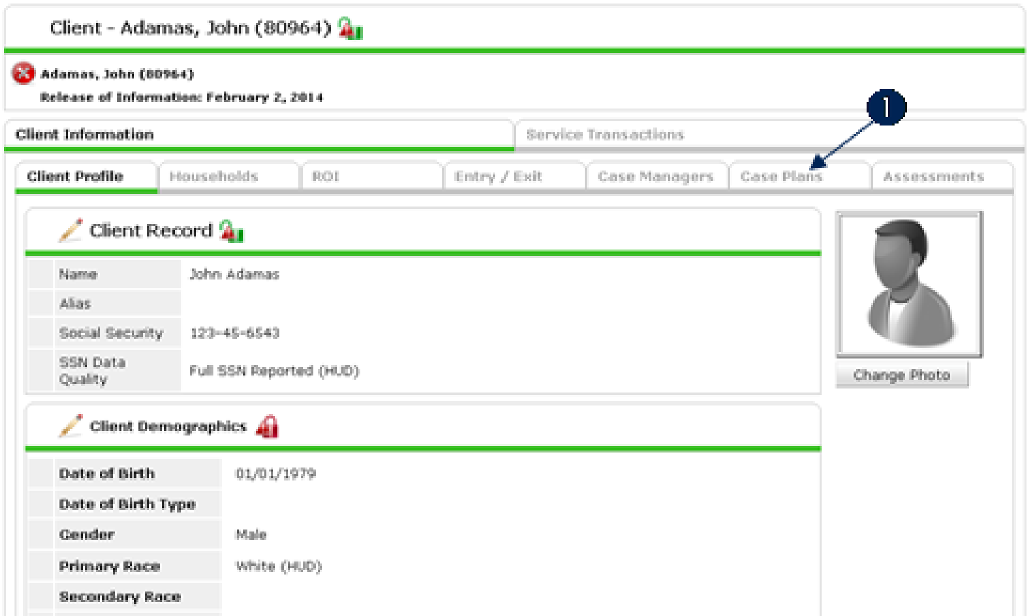

Figure 1-48

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 1-49)

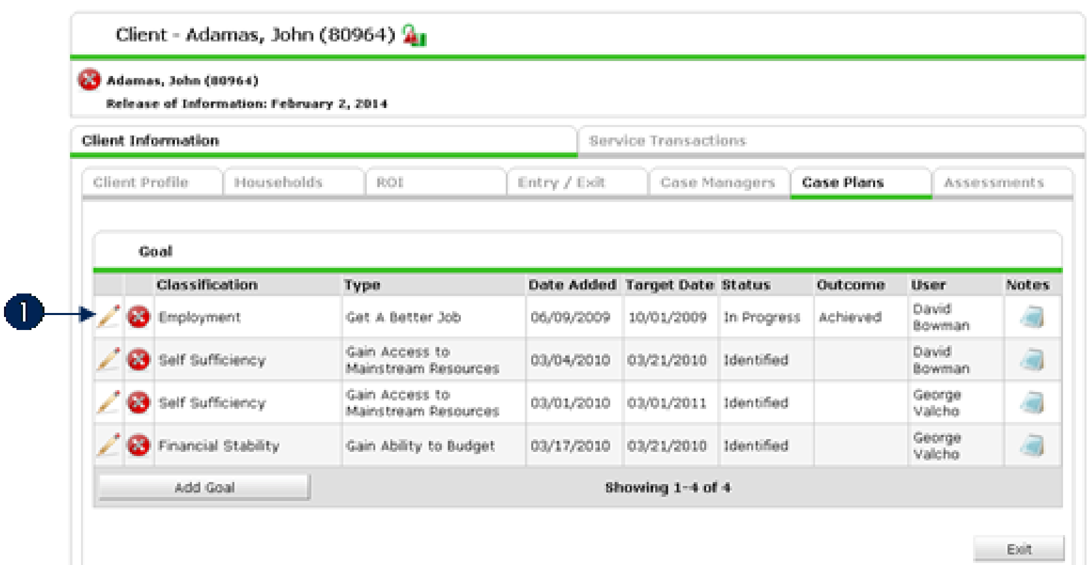

Figure 1-49

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 1-50)

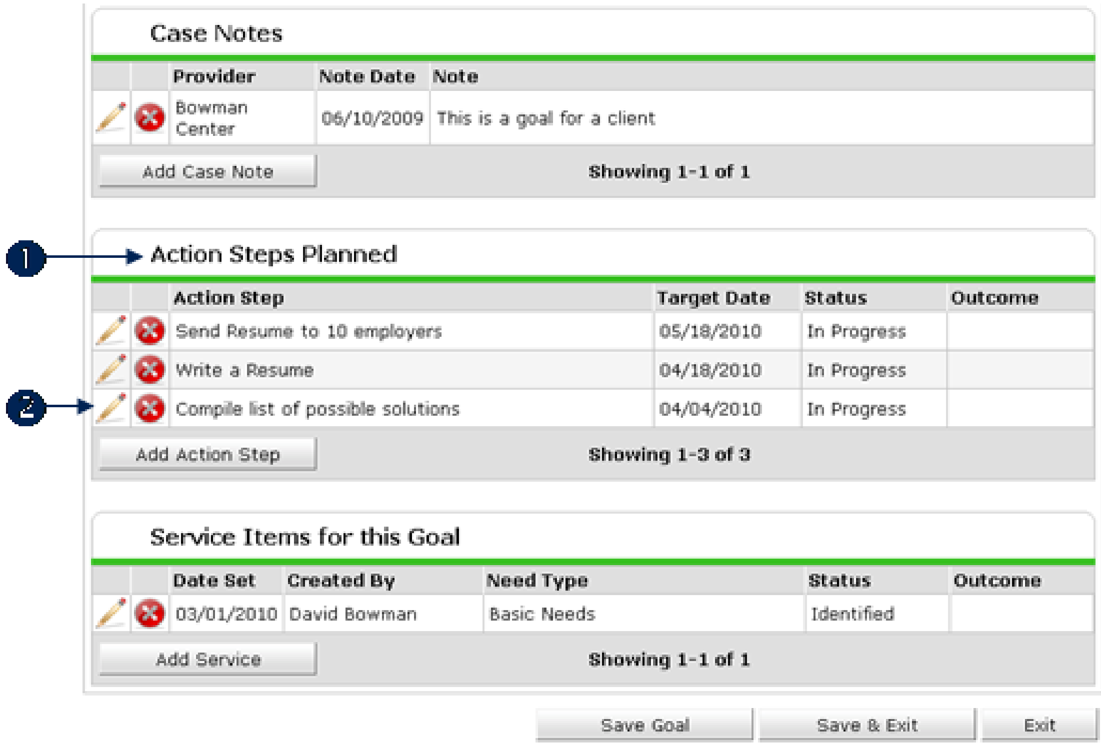

Figure 1-50

5. Scroll down to the **Action Steps Planned** section. **(1)**

6. Click the **pencil icon** to the left of the action step. **(2)** The **Action Step Data** window will display. (See Figure 1-51)

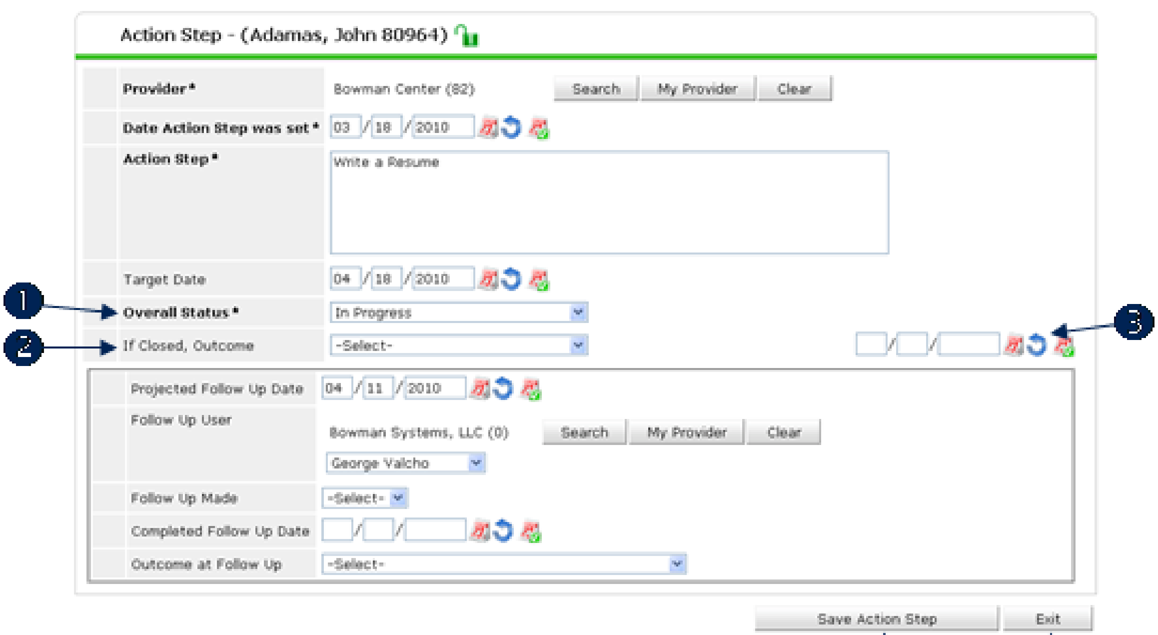

Figure 1-51

7. Select "Closed" from the **Overall Status** picklist. **(1)**

8. Select the reason you are closing the Action Step from the **If "Closed," Outcome** picklist. **(2)**

9. Enter the **Date** the Action Step was closed in mm/dd/yyyy format. **(3)**

10. Click **Save Action Step** to save the changes and remain on the current screen. **(4)**

11. Click **Exit** to move to the client's **Goal** screen. **(5)**