

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)

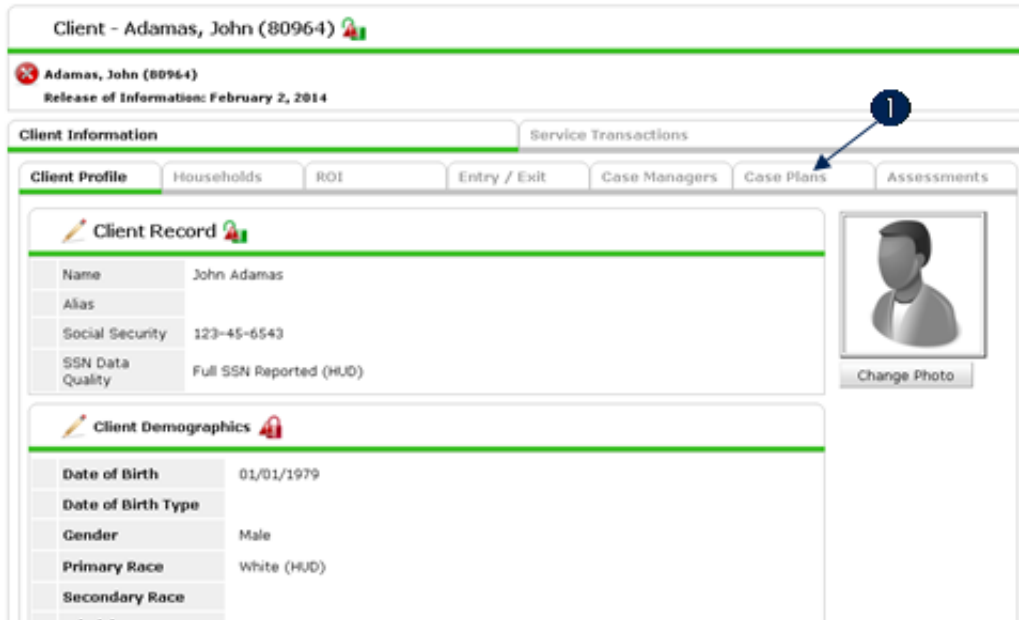


Figure 1-48

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)

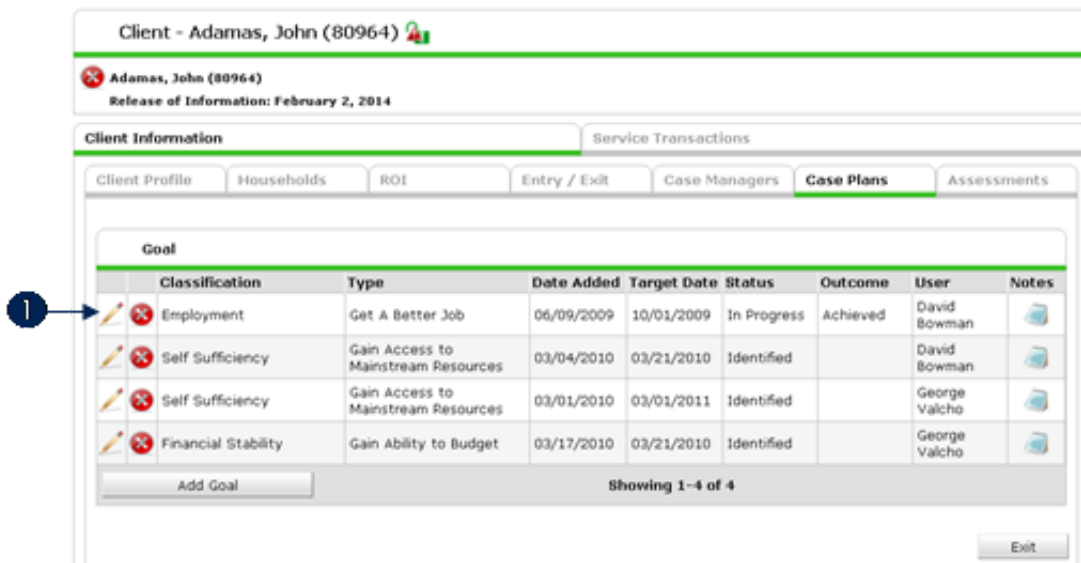




Figure 1-49







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)

Case Notes

	Provider	Note Date	Note
 	Bowman Center	06/10/2009	This is a goal for a client



Add Case Note Showing 1-1 of 1

Action Steps Planned

	Action Step	Target Date	Status	Outcome
 	Send Resume to 10 employers	05/18/2010	In Progress	
 	Write a Resume	04/18/2010	In Progress	
 	Compile list of possible solutions	04/04/2010	In Progress	

Add Action Step Showing 1-3 of 3

Service Items for this Goal

	Date Set	Created By	Need Type	Status	Outcome
 	03/01/2010	David Bowman	Basic Needs	Identified	

Add Service Showing 1-1 of 1

Save Goal Save & Exit Exit

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)

Action Step - (Adamas, John 80964)

Provider* Bowman Center (82) Search My Provider Clear

Date Action Step was set* 03 / 18 / 2010

Action Step* Write a Resume

Target Date 04 / 18 / 2010

Overall Status* In Progress

If Closed, Outcome -Select-

Projected Follow Up Date 04 / 11 / 2010

Follow Up User Bowman Systems, LLC (0) Search My Provider Clear
George Valcho

Follow Up Made -Select-

Completed Follow Up Date

Outcome at Follow Up -Select-

Save Action Step Exit

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)**