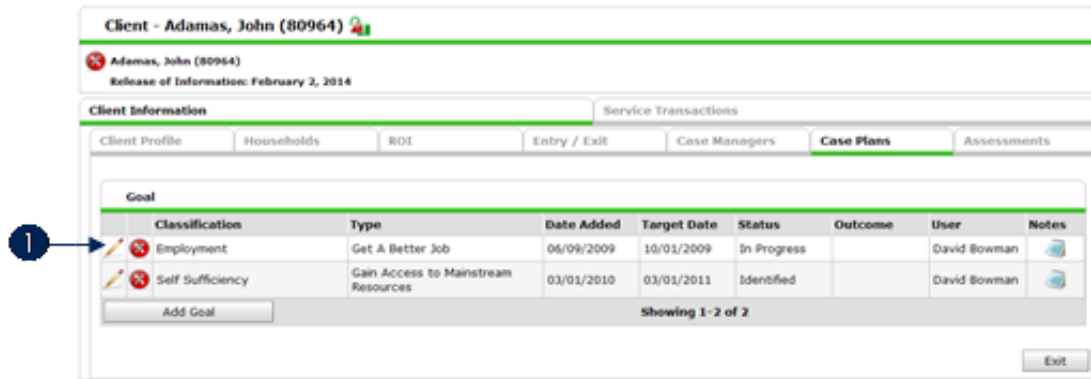


## EDIT A GOAL

Once a goal has been added for the client, you can edit, update, or follow up on any part of that goal.

1. From the [Client Profile](#) screen, click the **Case Plans** link. The screen will refresh and display a list of current goals. (See Figure 1-32)




The screenshot displays the 'Case Plans' section for a client named Adamas, John (80964). The interface includes a navigation bar with tabs for Client Profile, Households, ROI, Entry / Exit, Case Managers, Case Plans (selected), and Assessments. Below the navigation bar, there is a 'Goal' table with the following data:

Classification	Type	Date Added	Target Date	Status	Outcome	User	Notes
Employment	Get A Better Job	06/09/2009	10/01/2009	In Progress		David Bowman	
Self Sufficiency	Gain Access to Mainstream Resources	03/01/2010	03/01/2011	Identified		David Bowman	

A pencil icon is highlighted next to the first goal, 'Employment'. Below the table, there is an 'Add Goal' button and a status indicator 'Showing 1-2 of 2'. An 'Exit' button is located at the bottom right of the screen.

**Figure 1-32**

2. Each listed goal includes its basic information. This allows you to quickly identify the goal you wish to manage and view its **Target Date**. Click the **pencil icon**  to the left of the goal title. **(1)** The screen will refresh and display the goal information. (See Figure 1-33)

**Goal - (Adamas, John 80964)**

**Provider\*** Bowman Center (82)

**Date Goal was set\*** 06 / 10 / 2009

**Classification\*** Employment

**Type\*** Get A Better Job

**Target Date** 10 / 01 / 2009

**Overall Status\*** In Progress

**If Closed, Outcome** Achieved    03 / 04 / 2010

**Projected Follow Up Date** 07 / 07 / 2010

**Follow Up User** Bowman Systems, LLC (0)     
 BIS Employee

**Follow Up Made** No

**Completed Follow Up Date**  /  /

**Outcome at Follow Up** -Select-

**Case Notes**

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

Showing 1-1 of 1

**Action Steps Planned**

Action Step	Target Date	Status	Outcome
Compile list of possible solution	10/04/2009	In Progress	

Showing 1-1 of 1

**Service Items for this Goal**

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

Showing 1-1 of 1

3. Make the desired changes; in this case, noting the outcome and follow up date. **(1)** Click **Save & Exit** to return to the previous screen with the changes updated. (See Figure 1-34)

Client - Adams, John (80964)

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

Client Information | Service Transactions

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

Goal

Classification	Type	Date Added	Target Date	Status	Outcome	User	Notes
Self Sufficiency	Gain Access to Mainstream Resources	03/01/2010	03/01/2011	Identified		David Bowman	
Employment	Get A Better Job	06/09/2009	10/01/2009	In Progress	Achieved	David Bowman	

Add Goal

Showing 1-2 of 2

Exit

Figure 1-34

4. The updated record now shows. (1)