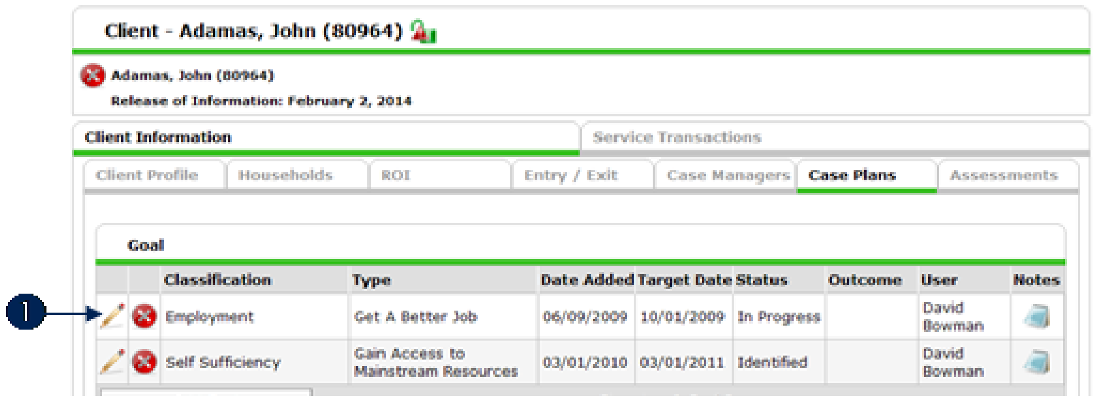
Action Steps

ServicePoint allows you to add action steps for **Case Plans**.

1. Locate the Goal to which you would like to add an action step. (See Figure 1-22)



2. Click the **Edit** icon next to the **Goal**. **(1)** The **Goal** will open. Scroll down to see the **Action Steps** (See Figure 1-23)

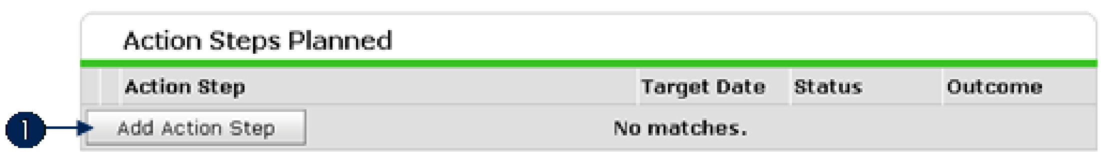


Figure 1-23

3. Click **Add Action Step**. **(1)** The **Action Steps Planned** window will display. (See Figure 1-24)

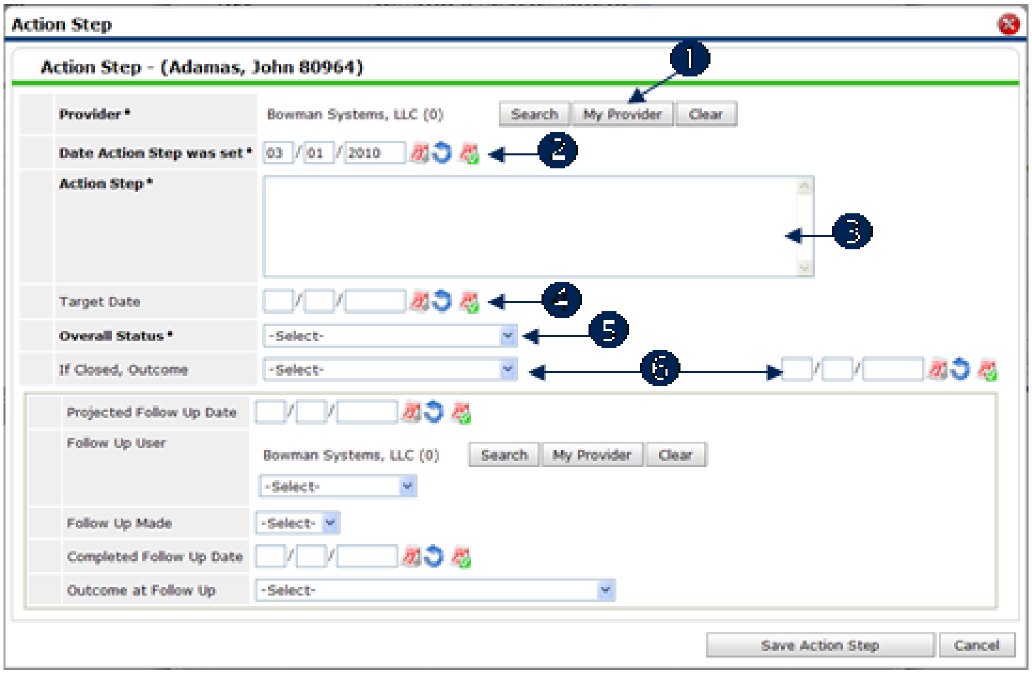


Figure 1-24

4. Complete each field in the action step section:

   a: By default, the **Provider** associated with the action step will display; however, the provider can be changed by clicking **Search** or **My Provider**. **(1)**

   b: Enter the **Date Action Step was Set** in mm/dd/yyyy format or use one of the date auto-fill icons. **(2)** By default it will be set to the current date.

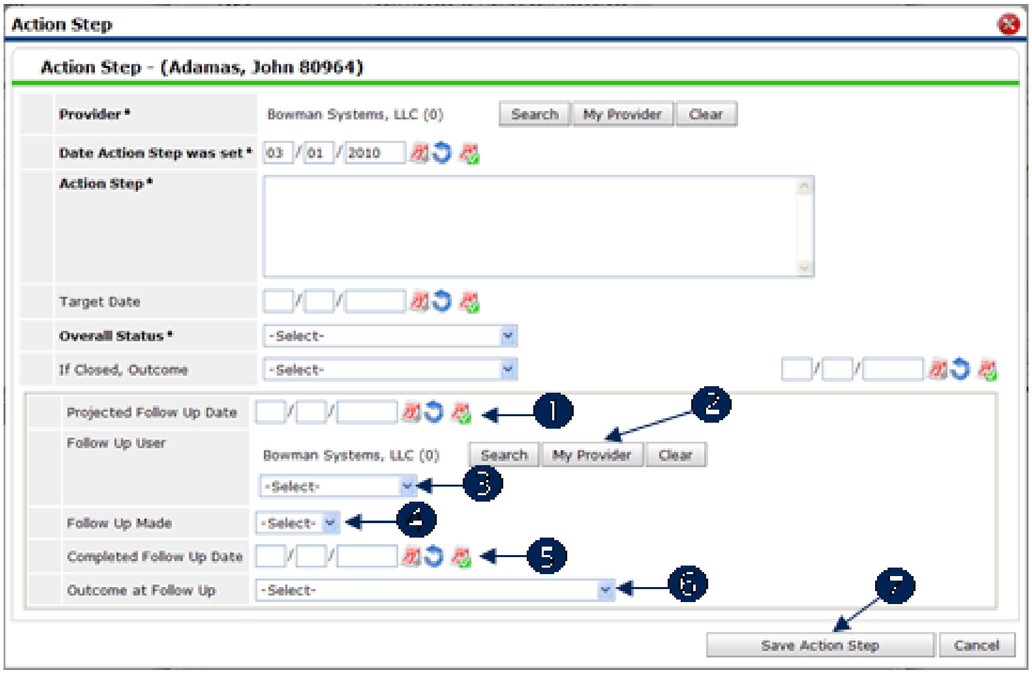
   c: Describe the step in the **Action Step** text box. **(3)**

   d: Enter the date by which the action step should be completed in the **Target Date** field or use one of the auto-fill icons. **(4)** This must be entered in mm/dd/yyyy format.

   e: Select the **Overall Status** of the action step from the picklist provided. **(5)**

   f: **If Closed, Outcome**: there may be a possibility that the case plan is entered and the goal may be met on the same day and it is being entered in one step. If so, select the outcome and date of outcome. **(6)**

5. Complete each field in the follow up section: (See Figure 1-25)



g: **Projected Followup Date**: If there will be a follow-up on this action step, enter the date you anticipate the follow-up will take place or select from one of the auto-fill icons. **(1)** The date must be in the mm/dd/yyyy format.

h: **Follow Up User**: This is the user who is assigned to follow up with the client. A picklist of available users appears based on the provider. Click **My Provider** to select your default provider for which the user list will be associated (or click **Search** to find another provider). **(2)** Select the user from the pick list. **(3)**

i: **Follow Up Made**: Select the status from the picklist. **(4)**

j: **Completed Follow Up Date**: Enter the date the follow-up was completed or select from one of the auto-fill icons. **(5)** The date must be in the mm/dd/yyyy format.

k: **Outcome at Follow Up**: Select from the options in the picklist. **(6)**

6. Click **Save Action Step**. **(7)** The **Action Step Data** window will close. The **Action Step** screen will refresh and display the action step details in the **Action Steps Planned** section. (See Figure 1-25)

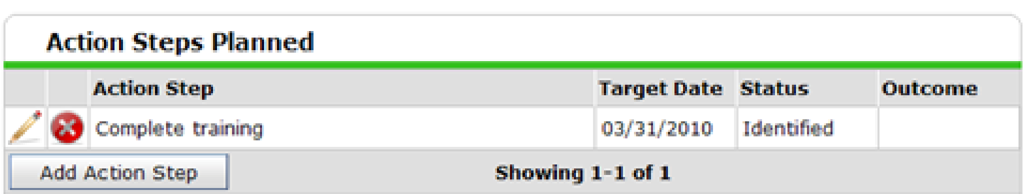


Figure 1-25