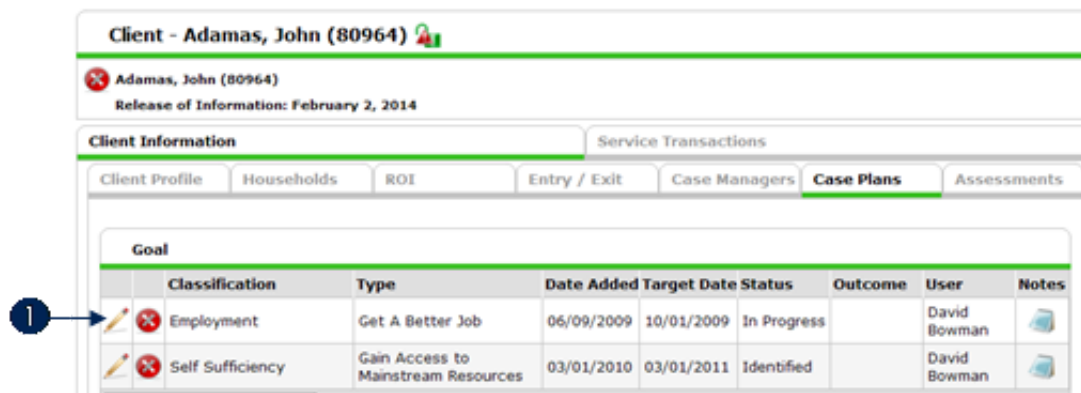


Action Steps

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)









Client - Adamas, John (80964)

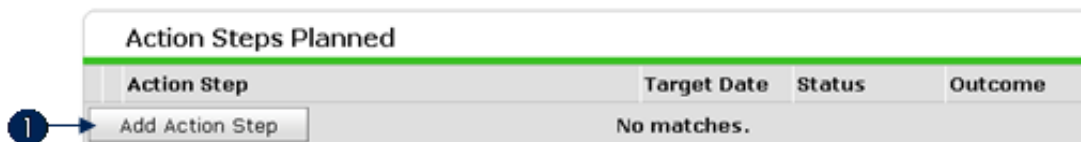
Adamas, John (80964)
Release of Information: February 2, 2014

Client Information | Service Transactions

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

Goal	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	

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)



Action Steps Planned			
Action Step	Target Date	Status	Outcome
<input type="button" value="Add Action Step"/>	No matches.		

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)

Action Steps Planned			
Action Step	Target Date	Status	Outcome
Complete training	03/31/2010	Identified	

Add Action Step Showing 1-1 of 1

Figure 1-25