

ADDING GOALS TO CASE PLANS

1. To add a goal to a case plan, first select the client in *ClientPoint* to whom you wish to add a goal. (See Figure 1-14)

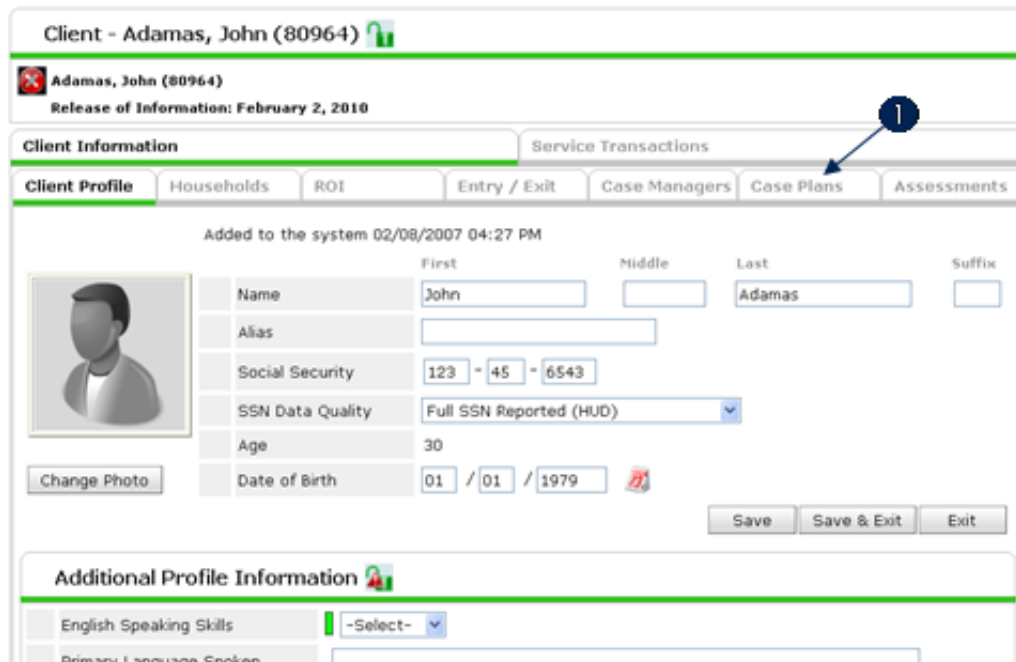


Figure 1-14

2. Once you are working with a client profile, click the gray **Case Plans** tab. **(1)** The screen will refresh and display the **Case Plans** screen. A blue arrow will appear next to the **Case Plans** link to indicate that you are on the **Case Plans** screen. (See Figure 1-15)

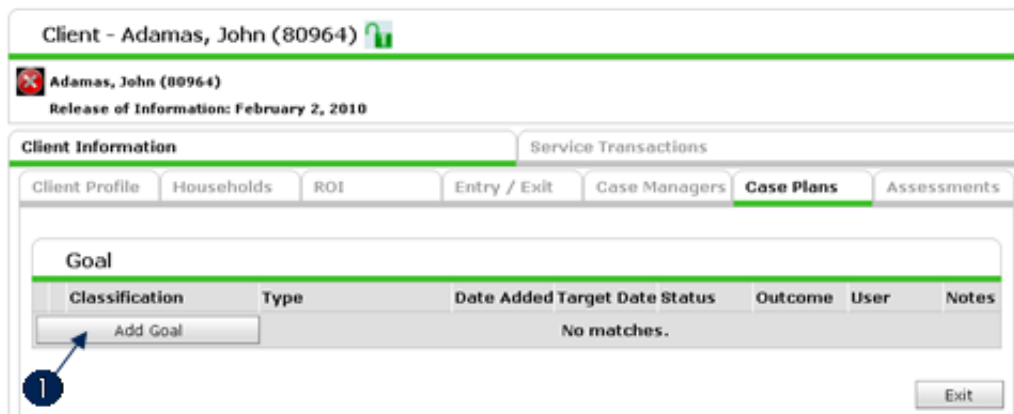


Figure 1-15

3. Click **Add Goal**. **(1)** The screen will refresh and display the **CasePlan – Add A New Goal** screen. (See Figure 1-16)

Goal - (Adamas, John 80964)

Provider * Bowman Systems, LLC (0)

Date Goal was set * 03 / 01 / 2010

Classification * Self Sufficiency

Type * Gain Access to Mainstream Resources

Target Date 03 / 01 / 2011

Overall Status * Identified

If Closed, Outcome -Select- / /

Projected Follow Up Date 04 / 01 / 2010

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

Follow Up Made No

Completed Follow Up Date / /

Outcome at Follow Up -Select-

Figure 1-16

4. Complete each field in the **Goal Data** section:

- a: **Provider**: Select your default provider—for which the client and client goal will be associated with —by clicking **My Provider**. **(1)** Alternatively click the **Search** button to search for another provider.
- b: **Date Goal was Set (2)**: Enter the appropriate date, which is self-populated with the current date. The date must be in the mm/dd/yyyy format.
- c: **Classification (3)**: Select the applicable goal classification from the **Classification** picklist.
- d: **Type (4)**: Select the corresponding goal type from the second **Type** picklist.
- e: **Target Date (5)**: Enter the intended completion date for the stated goal. The date must be in the mm/dd/yyyy format.
- f: **Overall Status (6)**: Select the option that best describes the progress toward the stated goal.
- g: **If Closed, Outcome (7)**: 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.

5. Complete each field in the follow up section: (See Figure 1-17)

Goal - (Adamas, John 80964)

Provider * Bowman Systems, LLC (0) [Search] [My Provider] [Clear]

Date Goal was set * 03 / 01 / 2010 [Auto-fill icons]

Classification * -Select- [v]

Type * -Select- [v]

Target Date [] / [] / [] [Auto-fill icons]

Overall Status * -Select- [v]

If Closed, Outcome -Select- [v] [] / [] / [] [Auto-fill icons]

Projected Follow Up Date [] / [] / [] [Auto-fill icons] ← (1)

Follow Up User Bowman Systems, LLC (0) [Search] [My Provider] [Clear] [v] ← (2)

Follow Up Made -Select- [v] ← (3)

Completed Follow Up Date [] / [] / [] [Auto-fill icons] ← (4)

Outcome at Follow Up -Select- [v] ← (5)

[Add Goal] [Cancel] ← (7)

Figure 1-17

- a: **Projected Followup Date:** If there will be a follow-up on this goal, 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.
 - b: **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)**
 - c: **Follow Up Made:** Select the status from the picklist. **(4)**
 - d: **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.
 - e: **Outcome at Follow Up:** Select from the options in the picklist. **(6)**
6. Click **Add Goal**. **(7)** The screen will refresh and display a summary of your goal. (See Figure 1-18)

Goal - (Adamas, John 80964)

Provider*	Bowman Center	<input type="button" value="Choose Provider"/>
Date Goal was set*	06 / 10 / 2009	
Classification*	Employment	<input type="button" value="v"/>
Type*	Get A Better Job	<input type="button" value="v"/>
Target Date	10 / 01 / 2009	
Overall Status*	In Progress	<input type="button" value="v"/>
If Closed, Outcome	-Select-	<input type="button" value="v"/> <input type="text"/> / <input type="text"/> / <input type="text"/>
Projected Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	
Actual Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	
Follow Up Made	<input type="checkbox"/>	
Outcome at Follow Up	-Select-	<input type="button" value="v"/>

Figure 1-18

7. Additionally, three new sections will appear near the bottom of the screen. (See Figure 1-19)

Case Notes				
Provider	Note Date Note			
<input type="button" value="Add Case Note"/>	No matches.			
Action Steps Planned				
Action Step	Target Date Status Outcome			
<input type="button" value="Add Action Step"/>	No matches.			
Service Items for this Goal				
Date Set	Created By	Need Type	Status	Outcome
<input type="button" value="Add Need/Service"/>	No matches.			
<input type="button" value="Save Goal"/>	<input type="button" value="Save & Exit"/>	<input type="button" value="Cancel"/>		

Figure 1-19

More:

- [Case Notes](#)
- [Action Steps](#)
- [Service Items](#)