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)

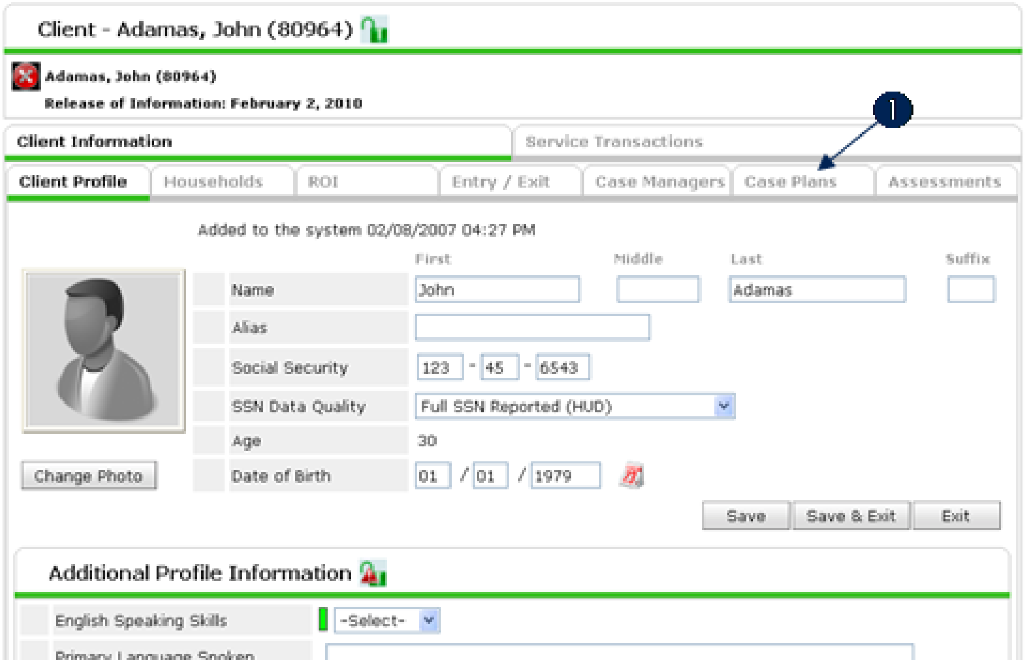

Figure 1-14

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)

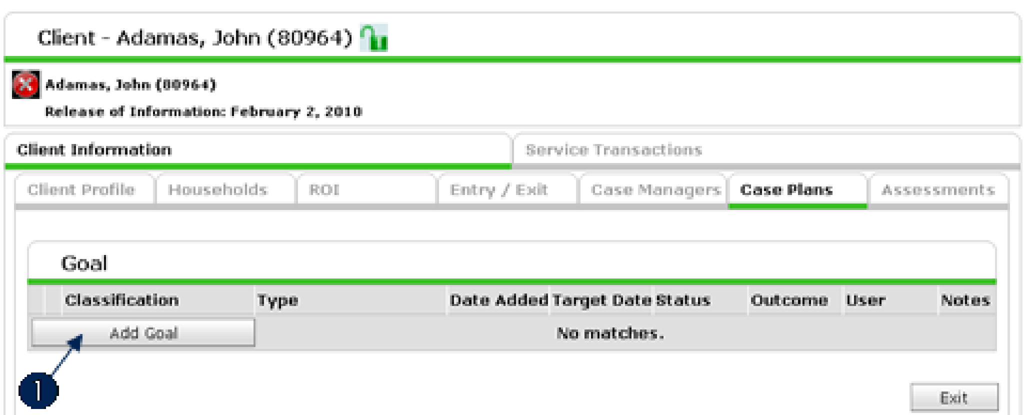

Figure 1-15

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

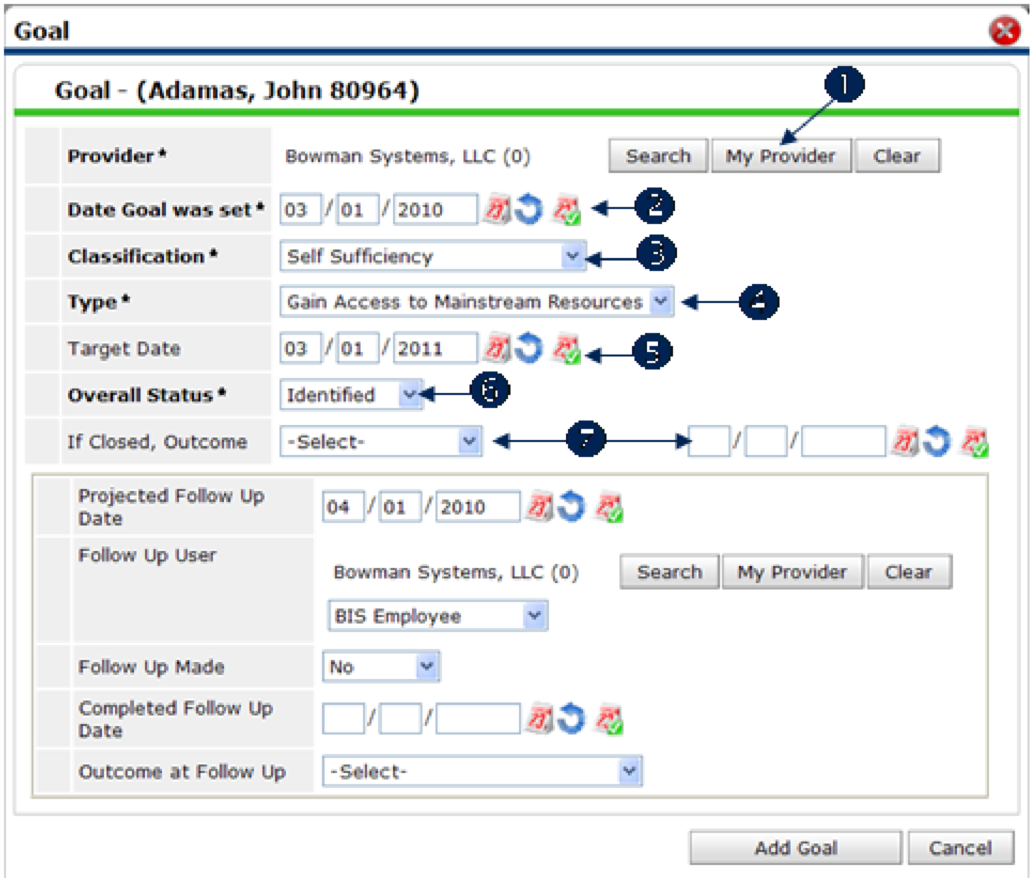

Figure 1-16

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)

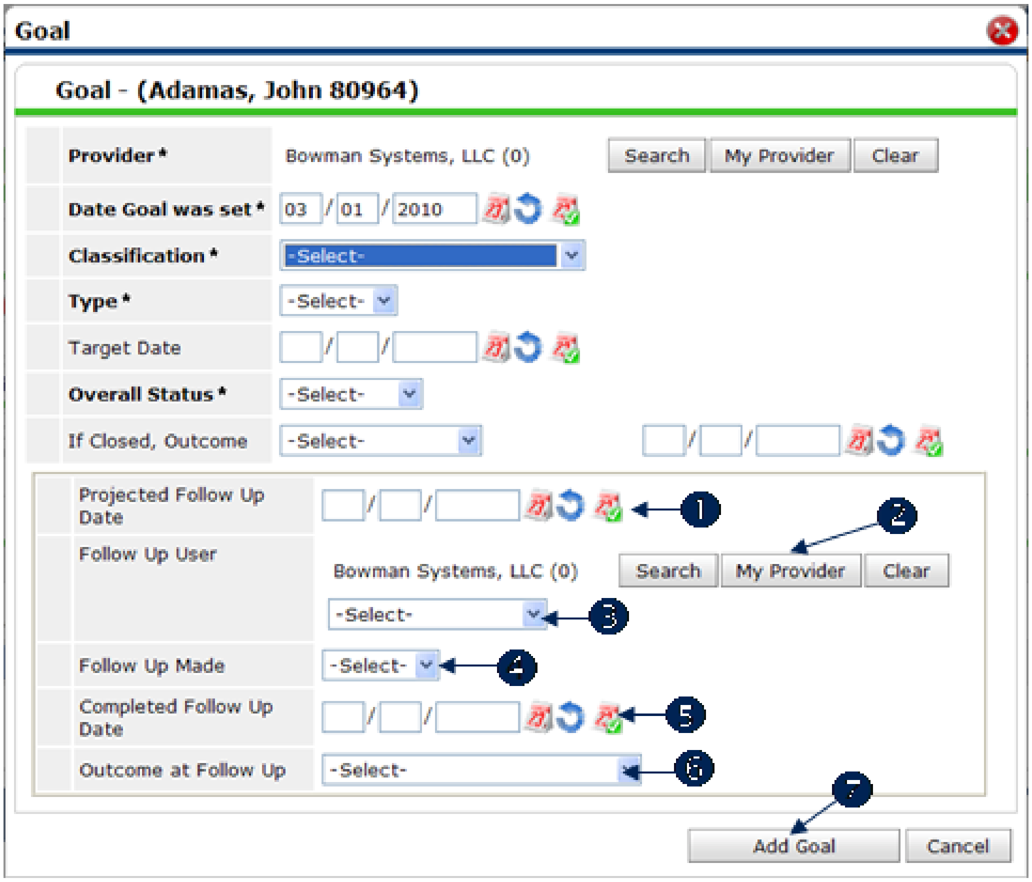

Figure 1-17

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)

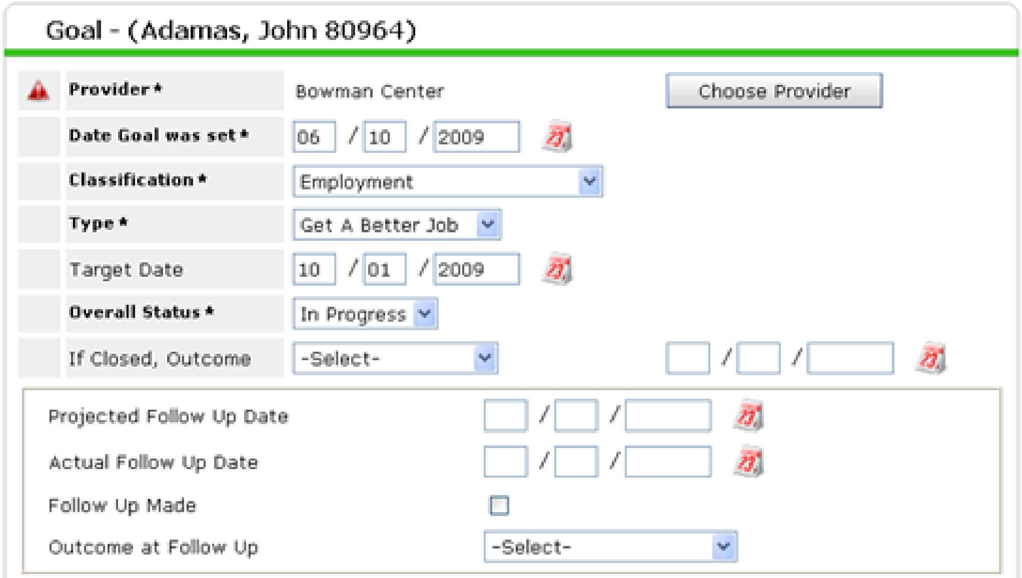

Figure 1-18

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

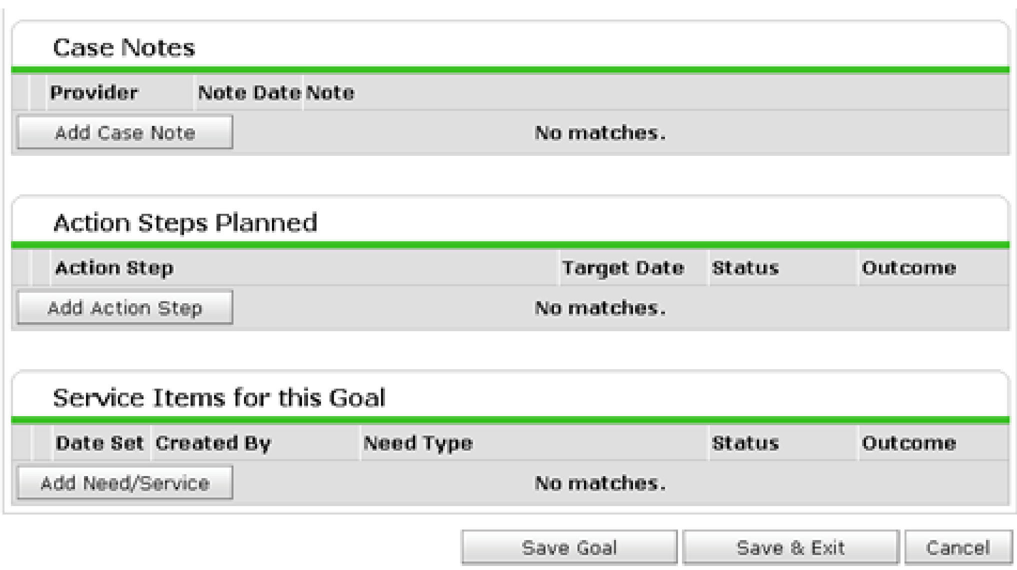

Figure 1-19

More:

- Case Notes
- Action Steps
- Service Items