

## COMPLETING AN ACTION STEP FOLLOW-UP

Action Step follow-up dates can be set when an action step associated with a client goal is initially created, or by editing the action step at a later date. Once a follow-up date has been set, the Action Step will be listed on the *ServicePoint* home screen.

### Complete an Action Step Follow-up from the Home Screen

1. Click the *Home* tab. The screen will refresh and display the *ServicePoint* home screen. (See Figure 1-41)

The screenshot shows the ServicePoint home screen for Bowman Systems, LLC. The page includes a navigation menu on the left with options like Home, ClientPoint, ResourcePoint, Reports, Admin, and Logout. The main content area features 'ServicePoint News' and 'Agency News' sections. A 'Follow Up List' table is visible at the bottom, with a red circle and the number 1 pointing to it. The table lists client follow-up dates and remaining time.

Client ID	Type	Date	Time Remaining
80982	Service	12/28/2009	Past
80964	Goal	03/27/2010	9 Days
80964	Action Step	04/11/2010	24 Days
80964	Action Step	05/04/2010	47 Days

Figure 1-41

2. At the bottom left of the screen there is a **Followup List**. (1) This is a list of follow-up dates that have been set for clients. The left column is a list of links that show the **Client ID**. Hover your mouse over the **Client ID** link. The name of the client will appear. This allows you to see the name of the client who has a follow up scheduled. (See Figure 1-42)

Follow Up List			
Client ID	Type	Date	Time Remaining
80982	Service	12/28/2009	Past
80964	Goal	03/27/2010	9 Days
80964	Action Step	04/11/2010	24 Days
<u>80964</u>	Action Step	05/04/2010	47 Days

John Adamas

**Figure 1-42**

- The projected follow-up dates are listed in the **Date** column, and the **Time Remaining** column indicates how much time is left from the current date until the projected follow-up date. If the projected follow-up date has already passed, then the word “**Past**” will be noted in red.
- Click the desired **Action Step** link. The screen will refresh and display the Action Step information. (See Figure 1-43)

**Note:** *If you click the **Client** link, the screen will refresh and display the **Client Profile** screen.*

**Action Step - (Adamas, John 80964)**

Provider\* Bowman Center (82) Search My Provider Clear

Date Action Step was set\* 03 / 18 / 2010

Action Step\* Write a Resume

Target Date 04 / 18 / 2010

Overall Status\* In Progress

If Closed, Outcome -Select-

Projected Follow Up Date 04 / 11 / 2010

Follow Up User Bowman Systems, LLC (0) Search My Provider Clear  
George Valcho

1 Follow Up Made -Select-

2 Completed Follow Up Date

3 Outcome at Follow Up -Select-

4 Save Action Step

5 Exit

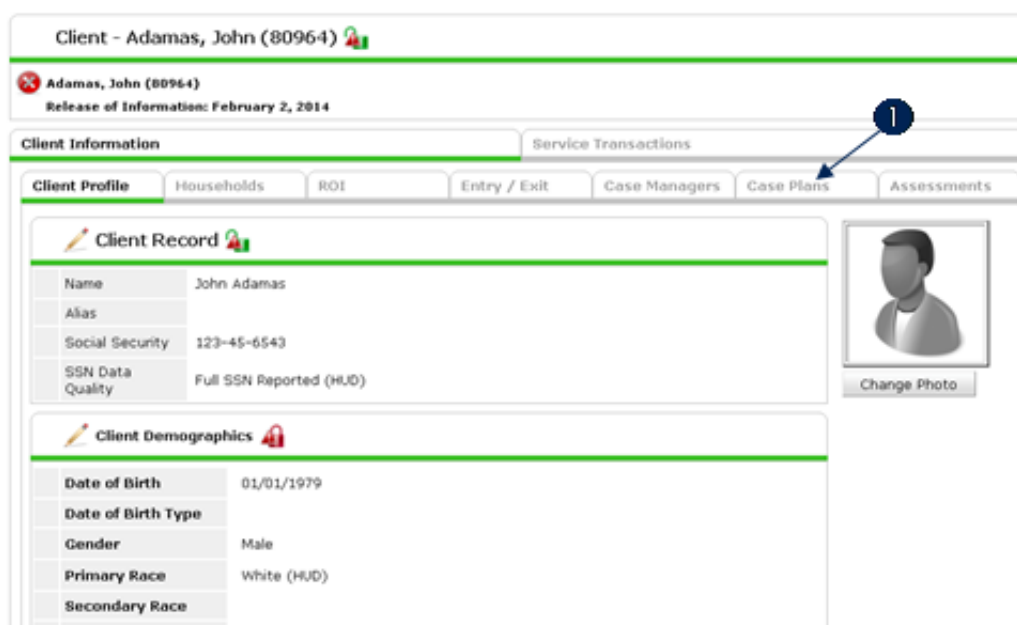
**Figure 1-43**

- Locate the **Follow Up** section.

6. If a follow up was made, use the **Follow Up Made** picklist and select **Yes**. **(1)**
7. Enter the **Completed Follow Up Date** in mm/dd/yyyy format. **(2)**
8. Select the status of the Action Step at the time the follow-up was made from the **Outcome at Followup** picklist **(3)**
9. Click **Save Action Step** to save the changes and remain on the current screen. **(4)** The screen will refresh and display the **Action Step** screen.
10. Click **Exit** to move to the client's **Goal** screen. **(5)**
11. Click the **Home** tab. The screen will refresh and display the *ServicePoint Home* screen. The follow-up you just completed will no longer be listed in the **Followup List**.

### **Complete an Action Step Follow-up from the Case Plans Screen**

1. Using *ClientPoint*, find a client and click the name to pull up the **Client Profile** screen. (See Figure 1-44)



**Figure 1-44**

2. From the **Client Profile** screen, click the **Case Plans** link. **(1)** The screen will refresh and display a list of current goals. (See Figure 1-45)

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	Achieved	David Bowman	
Self Sufficiency	Gain Access to Mainstream Resources	03/04/2010	03/21/2010	Identified		David Bowman	
Self Sufficiency	Gain Access to Mainstream Resources	03/01/2010	03/01/2011	Identified		George Valcho	
Financial Stability	Gain Ability to Budget	03/17/2010	03/21/2010	Identified		George Valcho	

Add Goal | Showing 1-4 of 4 | Exit

Figure 1-45

- 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 1-46)

**Case Notes**

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

Add Case Note | Showing 1-1 of 1

**Action Steps Planned**

Action Step	Target Date	Status	Outcome
Send Resume to 10 employers	05/18/2010	In Progress	
Write a Resume	04/18/2010	In Progress	
Compile list of possible solutions	04/04/2010	In Progress	

Add Action Step | Showing 1-3 of 3

**Service Items for this Goal**

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

Add Service | Showing 1-1 of 1

Save Goal | Save & Exit | Exit

Figure 1-46

- Scroll down to the **Action Steps Planned** section. **(1)**
- Click the **pencil icon** to the left of the action step. **(2)** The **Action Step Data** window will display. (See Figure 1-47)

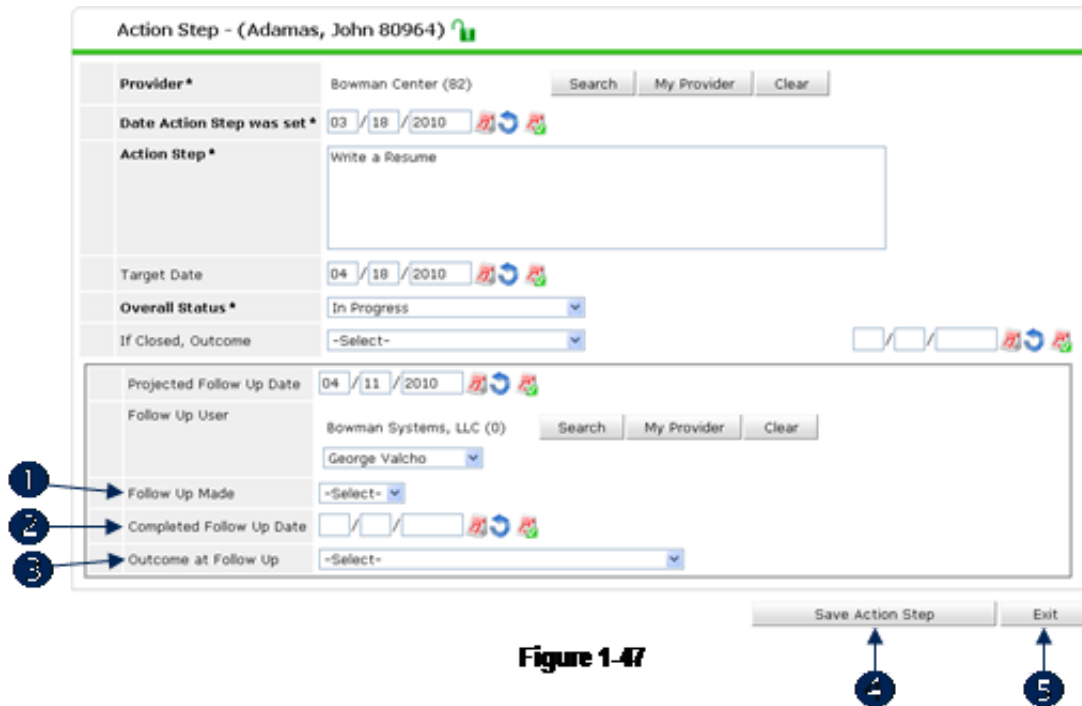


Figure 1-47

7. Locate the **Follow Up** section.
8. If a follow up was made, use the **Follow Up Made** picklist and select **Yes**. **(1)**
9. Enter the **Completed Follow Up Date** in mm/dd/yyyy format. **(2)**
10. Select the status of the Action Step at the time the follow-up was made from the **Outcome at Followup** picklist **(3)**
11. Click **Save Action Step** to save the changes and remain on the current screen. **(4)**
12. Click **Exit** to move to the client's **Goal** screen. **(5)**
13. Click the **Home** tab. The screen will refresh and display the *ServicePoint Home* screen. The follow-up you just completed will no longer be listed in the **Followup List**.