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)

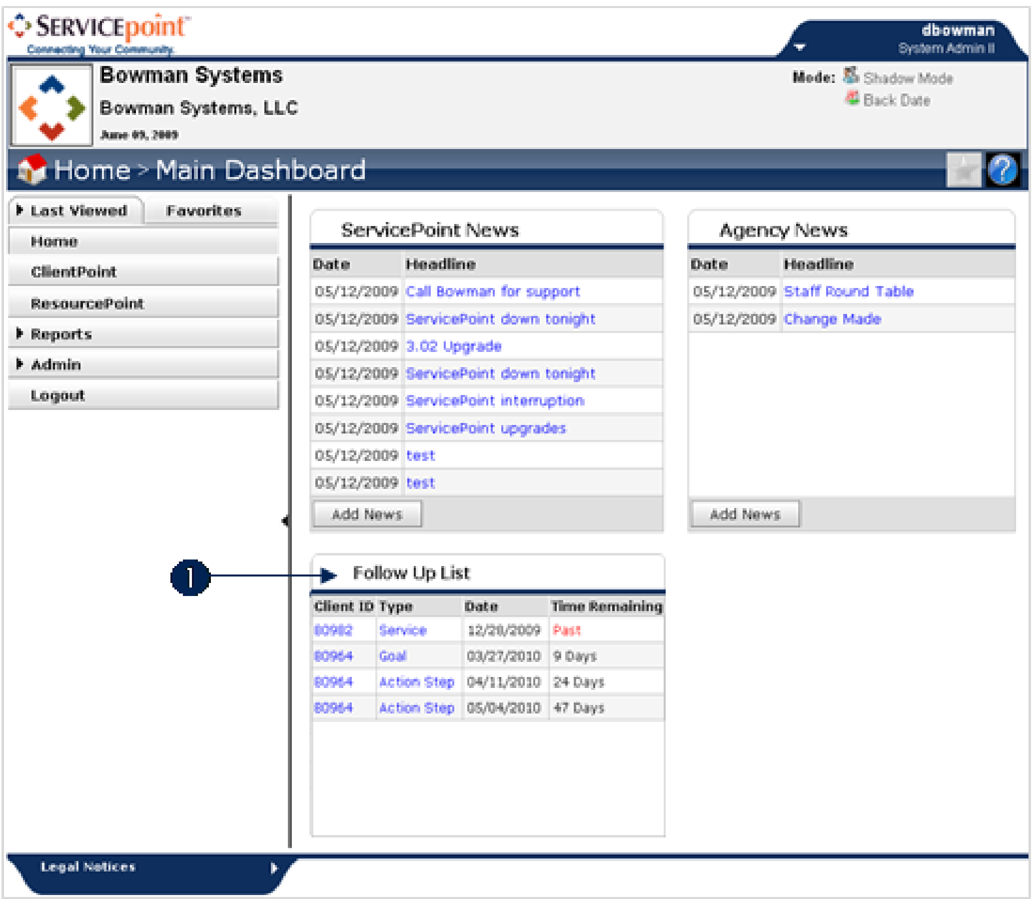
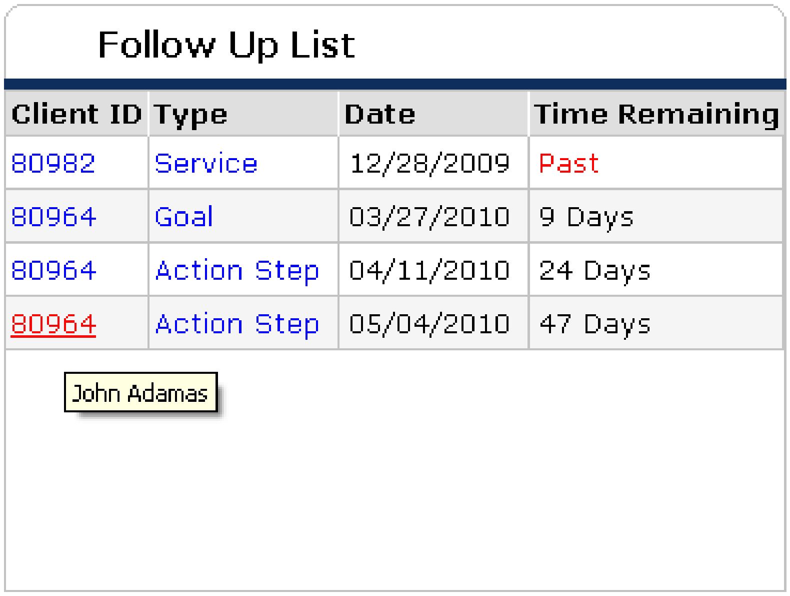


Figure 1-41

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
80964	Action Step	05/04/2010	47 Days

Figure 1-42

3. 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.

4. 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.*

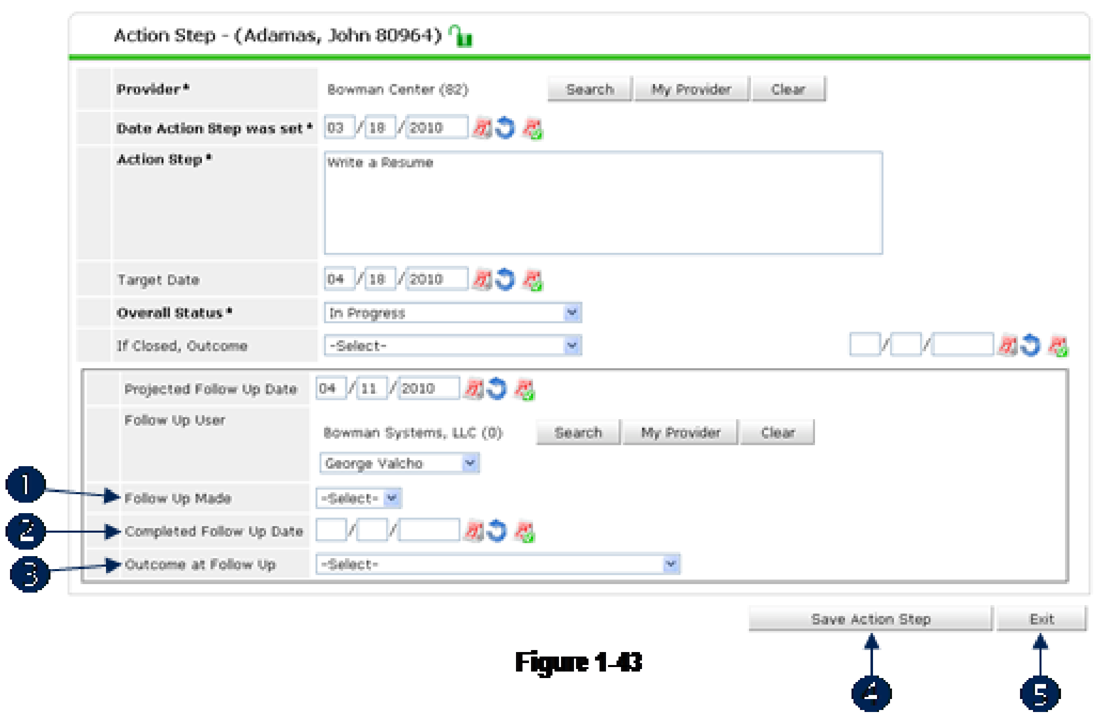


Figure 1-43

5. 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)

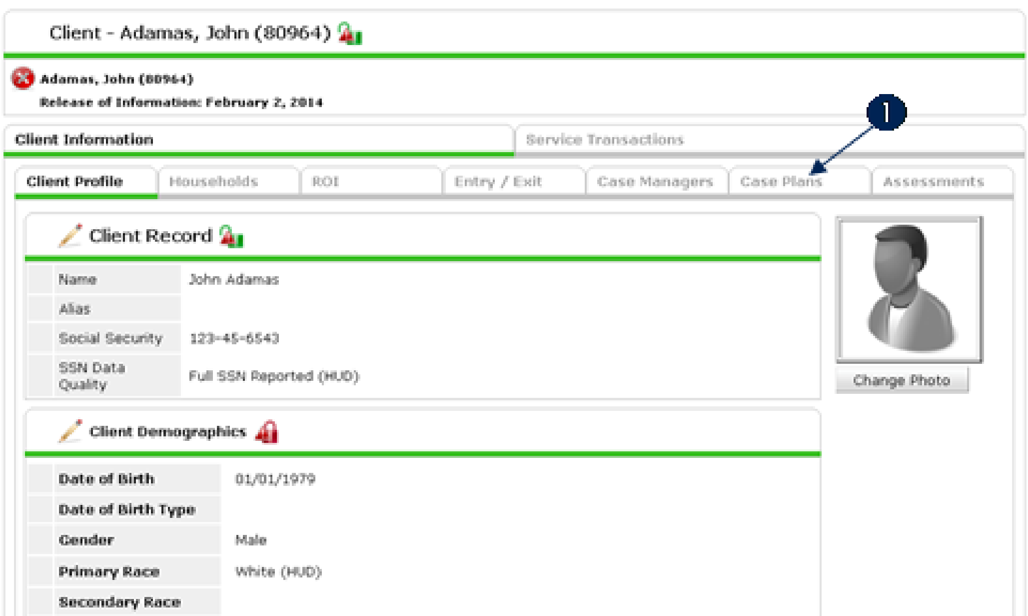


Figure 1-44

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)

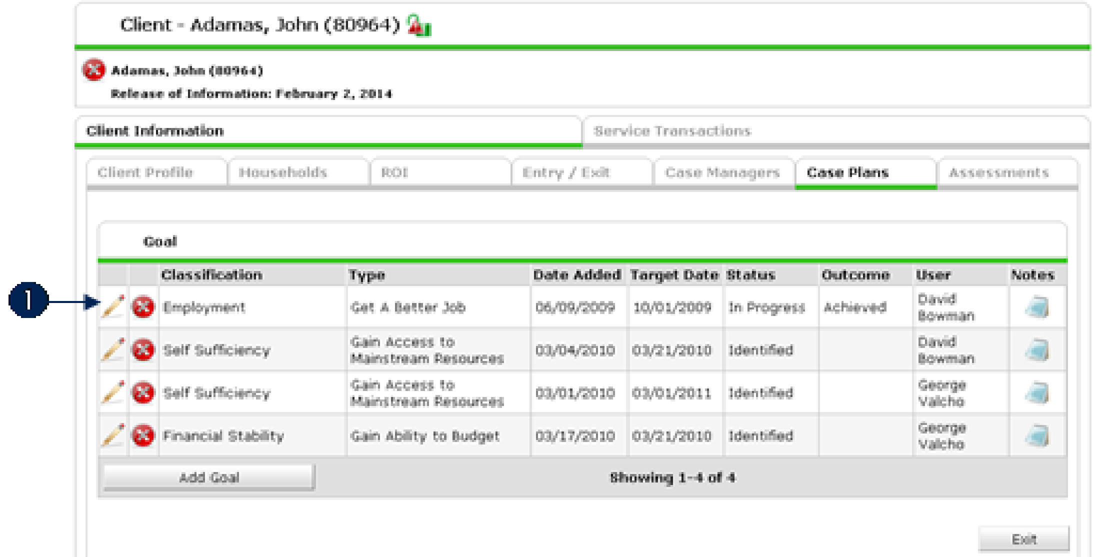


Figure 1-45

3. Each listed **Goal** includes its basic information. This allows you to quickly identify the goal you wish to manage and view its **Target Date**.

4. 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)

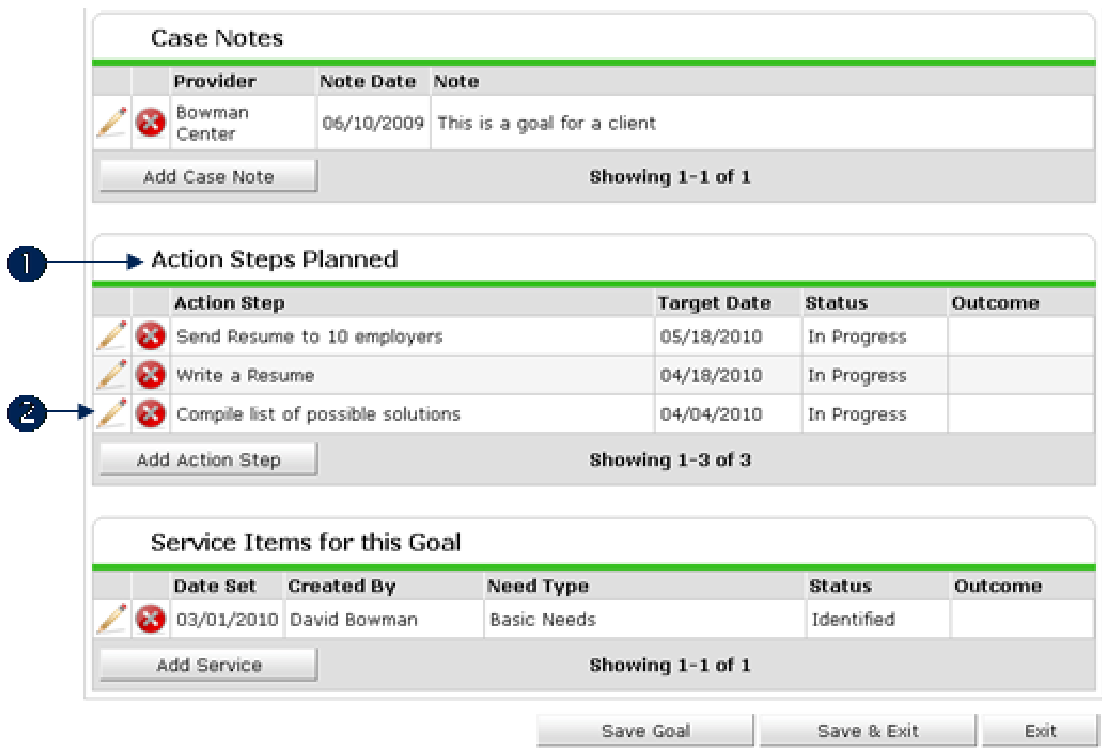


Figure 1-46

5. Scroll down to the **Action Steps Planned** section. **(1)**

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

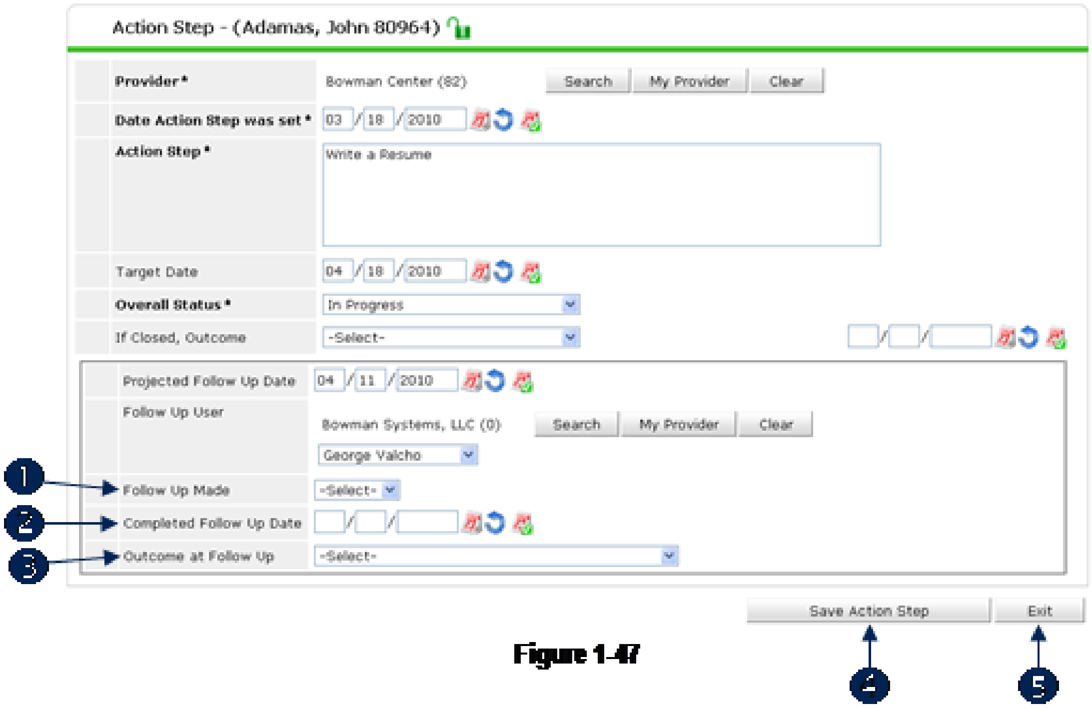


Figure 1-47

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**.