

DELETING AN ACTION STEP

1. Using *ClientPoint*, find a client and click the name to pull up the **Client Profile** screen. (See Figure 1-59)

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

Client Record

Name	John Adamas
Alias	
Social Security	123-45-6543
SSN Data Quality	Full SSN Reported (HUD)

Client Demographics

Date of Birth	01/01/1979
Date of Birth Type	
Gender	Male
Primary Race	White (HUD)
Secondary Race	

Change Photo

Figure 1-59

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 1-60)

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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 1-60

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 1-61)

The screenshot displays a software interface with three main sections:

- Case Notes:** A table with columns: Provider, Note Date, Note. One entry: Bowman Center, 06/10/2009, This is a goal for a client.
- Action Steps Planned:** A table with columns: Action Step, Target Date, Status, Outcome. Three entries:
 - Send Resume to 10 employers (Target Date: 05/18/2010, Status: In Progress)
 - Write a Resume (Target Date: 04/18/2010, Status: In Progress)
 - Compile list of possible solutions (Target Date: 04/04/2010, Status: In Progress)
- Service Items for this Goal:** A table with columns: Date Set, Created By, Need Type, Status, Outcome. One entry: 03/01/2010, David Bowman, Basic Needs, Identified.

At the bottom are buttons: Save Goal, Save & Exit, Exit. Callout 1 points to the 'Action Steps Planned' section header. Callout 2 points to the red X icon in the first row of the 'Action Steps Planned' table.

Figure 1-61

5. Scroll down to the **Action Steps Planned** section. **(1)**
6. Click the **Red X icon** to the left of the action step. **(2)** A warning window will appear stating the following, "Are you sure you want to delete this Action Step?" (See Figure 1-62)

The dialog box has a title bar 'Please Confirm' with a red X icon. The main content area contains the text 'Please Confirm' and a warning icon followed by the question 'Are you sure you want to delete this Action Step (#5)?'. At the bottom are two buttons: 'Yes' and 'No'. Callout 1 points to the 'Yes' button.

Figure 1-62

7. Click **Yes** to continue. **(1)** The screen will refresh and the Action Step will no longer be listed in the **Action Steps Planned** section.