

Case Plans/Case Notes (v.1)

The *Case Plans* section is located within the CLIENTPOINT tab to the right of the *Assessments* section. Click on **Add Goal** to open up *Goal Data*, enter goal data, and click **Save Changes**.

IMPORTANT! If you enter data for more than one program, be sure to select the correct provider!

The screenshot shows the 'Case Plan - Add A New Goal' form. At the top, there is a navigation bar with tabs: Home, ClientPoint, ResourcePoint, ShelterPoint, SkanPoint, Reports, Help, and Logoff. Below this is a sub-navigation bar with Profile, Assessments, Case Plans, and Service Transactions. The main content area is titled 'Client - Test, Just A. (#1)' and 'Release of Info: None'. There are several icons for actions like 'Add', 'Delete', 'Print', 'Refresh', 'Close', 'Help', and 'Security'. The form has a 'Save Changes' and 'Exit' button. Below the title bar is a section for 'Household members' with a message: 'No Household members were found for this client.' The 'Goal Data' section contains the following fields: Provider (Bismarck CAP - PSH - S+C #1 (#31)), Date Goal was Set (08/22/2007), Goal Classification/Type (Employment / Get A Job), Target Date (09/15/2007), Overall Status (In Progress), and If "Closed", Outcome (-Select-). The 'Followup' section contains: Projected Followup Date (08/30/2007), Actual Followup Date, Followup Made (-Select-), and Outcome at Followup (-Select-).

Add Case Note, Add Action Step, and Add Need/Service buttons will display at the bottom.

The screenshot shows the bottom section of the Case Plan form. It contains three sections: 'Case Notes' with an 'Add Case Note' button and a message 'No Notes found for this goal.'; 'Action Steps Planned' with an 'Add Action Step' button and a table header with columns 'Step', 'Target Date', 'Status', and 'Outcome', and a message 'No Action Steps found for this goal.'; and 'Service Items For This Goal' with an 'Add Need/Service' button and a table header with columns 'Date Set', 'Created By', 'Need Type', 'Status', and 'Outcome', and a message 'No Service Items found for this goal.'

To add Case Notes, click on **Add Case Note**, enter notes in the text area, and click **Save**.

IMPORTANT! If you enter data for more than one program, be sure to select the correct provider!

The screenshot shows the 'Case Note Data (Just A. Test)' form. It has a 'Provider' dropdown set to 'Bismarck CAP - PSH - S+C #1 (#31)'. The 'Note Date' is set to '08/22/2007 05:21 PM'. There is a large text area for the note content with the placeholder text 'type case notes here'. At the bottom, there are 'Save' and 'Cancel' buttons.