

Case Management Training: Case Plans and Client Profile Functions

All example client names depicted herein are completely fictitious. No association with any real organization or persons is intended or should be inferred.

Case Plans

The HMIS platform offers agencies the abilities to add case plans and related goals, notes, and attachments for clients. This section will detail the most common case plan functionalities that can be used in ServicePoint.

Adding Assigned Case Manager

Please remember to get into Enter Data Mode as applicable. This will affect the data for the client.

The screenshot shows the 'Client Information' interface with several tabs: Summary, Client Profile, Households, Entry / Exit, Case Managers (circled in red), Case Plans, Measurements, Activities, and Assessments. Below the tabs is a table with columns: Name, Provider, Phone Number, Start Date, and End Date. The text 'No matches.' is displayed in the table. A blue circle highlights the 'Add Case Manager' button in the top left corner of the table area.

- 1) Find client and click on the Case Managers tab (Red Circle).
- 2) Click on the Add Case Manager button (Blue Circle).
- 3) Click on the radial button next to the word “Me”. Your user information will fill in automatically below.
- 4) Ensure the Start Date is correct.
- 5) Click the Add Case Manager button to save.

The screenshot shows the 'Add Case Manager' form with the following fields and annotations:

- Type ***: Radio buttons for ServicePoint User, Me, and Other. A red arrow points to the 'Other' option.
- Select User ***: A dropdown menu showing 'PSH Program (BOS Training Only) (40020)' and a '-Select-' dropdown below it.
- Name ***: Text input field.
- Title**: Text input field.
- Phone Number**: Text input field.
- Email Address**: Text input field.
- Provider ***: A dropdown menu showing 'PSH Program (BOS Training Only) (40020)'.
- Start Date ***: Date input field showing '03 / 09 / 2015' with calendar icons. A red arrow points to the date field.
- End Date**: Date input field with calendar icons.
- At the bottom, the **Add Case Manager** button is circled in red, next to a **Cancel** button.

Removing Case Manager




Note: Please be sure to edit this entry when the client exits, or is transferred to another case manager, and add an End Date.

Creating a Case Plan

**Get into Enter Data As mode if applicable*

- Find client and click on the Case Plans tab.
- Click the Add Goal button.
- Ensure Provider adding goal is correct.
- Choose your name from the Case Manager drop down list (will not populate until you add your name to the Case Manager tab as described previously).
- Ensure Date Goal was Set is correct.
- Choose a Classification from the drop down list. (i.e. Housing)
- Once you choose a Classification, corresponding Types (descriptors) will populate in the Types drop down box. Choose the applicable type. (i.e. Move to permanent affordable housing)

Optional: You may type in a more detailed explanation of the Goal in the Goal Description section.




















Provider *	PSH Program (BOS Training Only) (40020) ▼
Case Manager	-Select- ▼
Date Goal was Set *	03 / 09 / 2015   
Classification *	-Select- ▼
Type *	-Select- ▼
Goal Description	<div style="border: 1px solid #ccc; height: 50px;"></div>

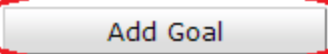
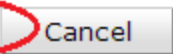
- Next, fill in the Goal's Target Date to completion, if applicable.
- Choose the Overall Status (i.e. In Progress)

Note: Do not fill out the fields in the red box below until Goal is achieved.

Optional: Follow Up Section...If you want to have a reminder on your ServicePoint Homepage to follow up with a particular client about a goal that was set, fill in the Projected Follow Up Date field.

- Click Add Goal.

Target Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	  
Overall Status *	-Select- 	
If Closed, Outcome	-Select- 	<input type="text"/> / <input type="text"/> / <input type="text"/>   
If Partially Complete, Percent Complete	-Select- 	
Projected Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	  
Follow Up User	PSH Program (BOS Training Only) (40020) 	
	-Select- 	
Follow Up Made	-Select- 	
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	  
Outcome at Follow Up	-Select- 	

- Once you click Add Goal, the window will expand to include more options.

Add Case Note: Used by some projects to document interactions with clients, usually related to the goal above.

Add Action Step: Used by some projects to document action steps taken to reach full goal above. For example, if the client’s goal was to obtain Housing, an action step might be to apply for Section 8 in their community.

Note: The Service Items for this Goal feature is not currently utilized.

- Click Save & Exit when complete.

Case Notes				
Provider	Case Manager	User Creating	Note Date	Note
Add Case Note		No matches.		

Action Steps Planned			
Action Step	Target Date	Status	Outcome
Add Action Step		No matches.	

Service Items for this Goal				
Date Set	Created By	Need Type	Need Status	Outcome of Need
Add Service		Add Multiple Services		
No matches.				

Print	Save Goal	Save & Exit	Exit
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- After clicking Save & Exit, you will be returned to the Goal Preview Pane. Click the Add Goal button again to add more goals for this client, or click the pencil next to established Goal to edit it.











Goals									
	Classification	Type	Date Set	Status	Outcome	User Updating	Provider	Notes	Latest Note Date
	Housing	Move to permanent affordable housing	03/09/2015	In Progress		Tricia Cano	PSH Program (BOS Training Only)		
Add Goal		Showing 1-1 of 1							

Optional Follow Up Section: If you created a Follow Up on one or more goals, then when you return to your Homepage, it will be listed in your Follow Up List area.

- The Client ID can be hovered over to see client's name, click it to jump to client's profile.
- The Type can be hovered over to see which goal this follow up is associated with, click it to jump to the client's goal.
- Date is the date you set the follow up for and Time Remaining will count down for you. Once you pass the follow up date, the Time Remaining section will say "PAST" in red until you close the follow up.

Follow Up List (1)			
Client ID	Type	Date	Time Remaining
87	Goal	04/15/2015	37 Days
<input type="button" value="Jump To Goal: Housing"/>			
<input type="button" value="View All"/>			

- To close this follow up and remove it from your Homepage, click on the Goal link under Type section.
- The goal will open, locate the Follow Up section.
- Enter a Yes for Follow Up Made question.
- Click Save & Exit.

Projected Follow Up Date	04 / 15 / 2015   
Follow Up User	PSH Program (BOS Training Only) (40020)  <input type="text" value="-Select-"/> 
Follow Up Made	<input type="text" value="Yes"/> 
Completed Follow Up Date	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/>   
Outcome at Follow Up	<input type="text" value="-Select-"/> 

Updating a Case Plan

*Get into Enter Data As mode if applicable

- Once a Goal has been achieved it should be updated. (All goals should be updated at client exit from project, even if they did not achieve them all.)

Case Plans

- Find Client and click on the Case Plans tab.
- Click on Edit Goal Pencil Icon next to the Goal you need to update.
- Change Overall Status to appropriate answer. (i.e. Closed)
- Enter answer for If Closed, Outcome. (i.e. Achieved) and enter date the goal's status changed to the right.
- If the goal was only Partially Achieved, assign a ranking to it using Percent Complete.
- Click Save & Exit.

Overall Status *	Closed			
If Closed, Outcome	Achieved	04	/	15 / 2015
If Partially Complete, Percent Complete	-Select-			

Adding Case Notes

- Find client and click on the Case Plans tab.
- Find the related Goal on the list that you want to document the client's progress on.
- Click the Edit Goal pencil icon and scroll down to the Case Notes area.
- Click the Add Case Note button.

Case Notes				
Provider	Case Manager	User Creating	Note Date	Note
Add Case Note				
No matches.				

- Select your name from the Case Manager drop down list. (Must have added yourself on the Case Managers tab)
- Complete the body of your note.
- Click Save Case Note.


Please note: Case notes cannot be altered after you save them. Be sure they are absolutely correct before saving it. If you make an error they cannot be deleted, you must write another case note explaining the error on the previous case note.




Case Note - (82) Wayne, John


▼ **Household Members**

No Household Members were originally associated.

Provider * Lodestar Day Resource Center, Inc (14656)


Case Manager -Select- 

Note Date * 03 / 10 / 2015   

Note * 

- Once note is saved, you will see it listed in the Case Notes preview pane. Repeat steps above to add more notes to your client’s goal.
- This particular goal, with or without case notes, can be printed out, if applicable, by clicking the Print button on bottom left corner of window.
- Click Save & Exit.

Case Notes

Provider	Case Manager	User Creating	Note Date	Note
 Lodestar Day Resource Center, Inc		Tricia Cano	03/10/2015	test note

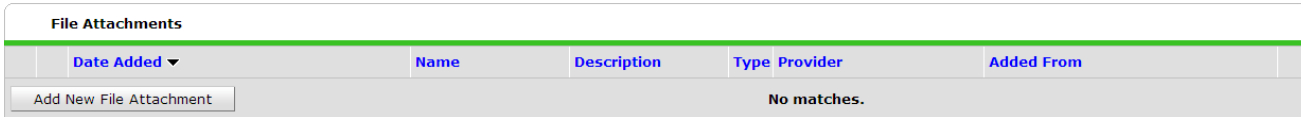
Showing 1-1 of 1

- From the Case Plans tab, the entire Case Plan can be printed out, if applicable, by clicking the Print Case Plan button on bottom left corner.

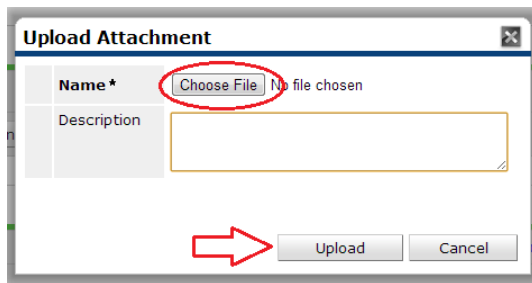
Client Profile Functions

Creating a File Attachment

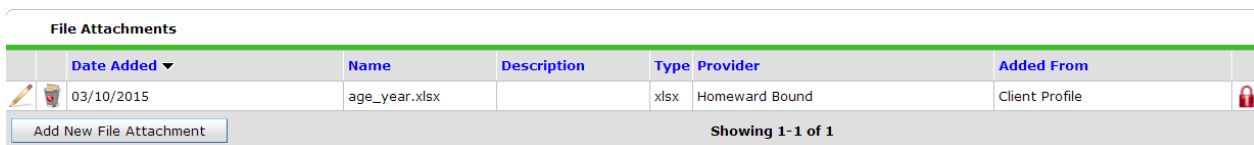
- Find client and scroll to the bottom of the Client Profile tab, locate the File Attachments section.
- Click the Add New File Attachment button.



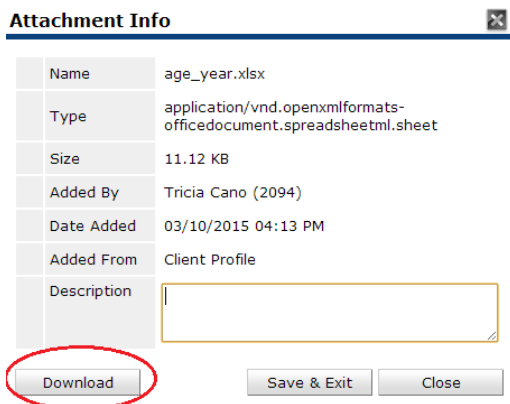
- Click the Choose File button and browse your computer to locate document to be uploaded. Once document is located, double click on it. You will return to ServicePoint and document name will be listed next to Choose File button. Click the Upload button to complete the process.



- Once document is uploaded, it will populate in the File Attachments preview pane.
- To view uploaded documents, click the Edit pencil icon next to document.



- Click the Download button on the Attachment Info window.



Creating an Incident

- Find client and scroll to the bottom of the Client Profile tab, locate the Incidents section.
- Click the Add New Incident button.

Incidents						
Start Date	End Date	Incident	Incident Code	Provider	Ban	Site
Add New Incident		No matches.				

- Choose correct Provider from drop down list if applicable.
- Enter Start Date of the incident.

Optional: Enter an End Date if the incident or ban has a time limit.

- Choose Incident type from the drop down list.
- The Ban yes/no radial buttons can be used if client is being banned from the project or areas within the project. If client is only being barred from particular areas at project, specify areas in Sites Barred From field.
- Type your name in the Staff Person text field.
- Additional information can be documented under the Notes section.
- Click Save.

Add a New Incident - (84) Gray, John

Provider *	Thunderbird Village (14746)
Start Date *	03 / 10 / 2015
End Date	
Incident	- Select -
Incident Code	- Select -
Ban	
Staff Person	
Sites Barred From	
Notes	