SERVICE PLANS – VIDEO COMPANION GUIDE

CaseWorthy Training & Documentation

Contents

Video Companion Guide Overview

The purpose of this Video Companion Guide is to assist Users in their understanding of the material which is covered in the Video Resource Guides for System Administrators. This is NOT a standalone Guide.

This guide is largely the script which was created for the video. Please know that the examples used in the guide are *parallel* to those in the video, but the process is the same. *For example*, the video might show Cynthia Brown receiving a service while the guide shows screenshots for Claire Davis. The recording of the service for Claire will follow the same procedure as Cynthia.

Each guide correlates with an entire video series. Each section of the guide corresponds with an individual video in the series.

This guide may be used:

- while watching the videos
- for reference while taking the class independently
- for reference after the implementation process
- as a reference when documenting custom configuration

As CaseWorthy is continually growing and expanding, the Video Companion Guides for System Administrators will be updated to show changes before the videos. Information, which is not included in the video, but is current in the CaseWorthy application will appear similar to the text below:

UPDATE: Text that follows this icon will be updates to the material that are not yet available in video format.

Overview

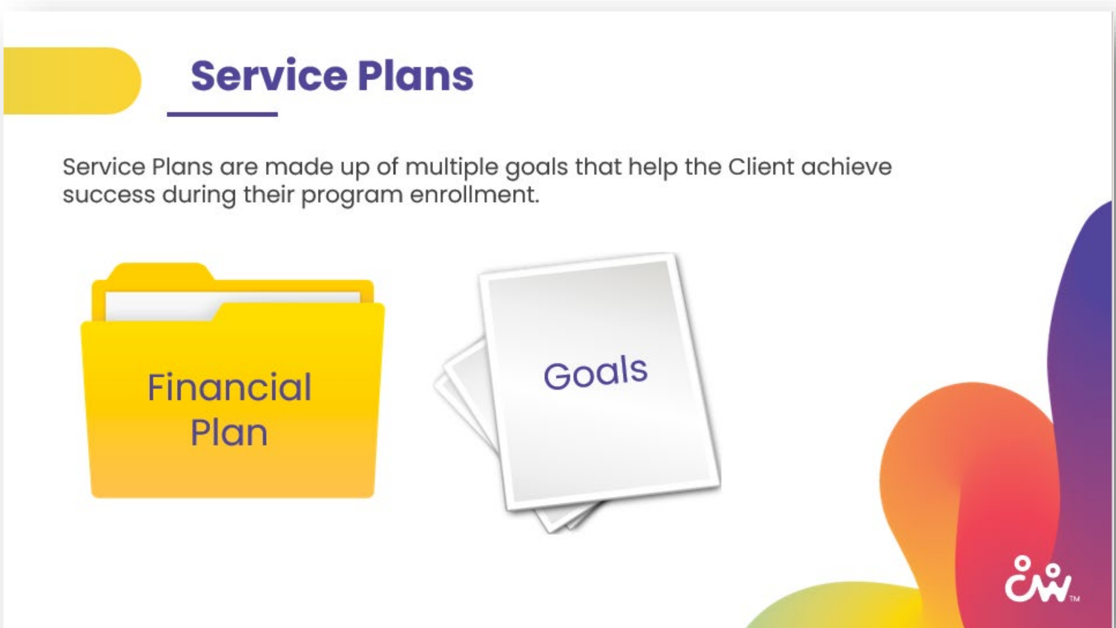
The *Service Plans* video series includes information about the following topics:

- An overview of Service Plans.
- The necessary system configuration for Service Plans, Goals, and Goal Steps including mapping.
- Using the Service Plan Workflow to record a Service Plan.
- Recording Preset Service Plans and Copying Existing Plans.
- Managing Service Plans.
- And using the Service Plan Report.

This first video provides on overview of Service Plans and their functionality within the application.

What is a Service Plan?

A Service Plan consists of one or more goals to help the Client achieve success during their program enrollment. Each goal consists of goal steps which details a plan to achieve the goal.



The videos in this series use the example of a Financial Plan to aid the Client in improving their financial situation. The Service Plan itself will be the Financial Plan, and the goals and goal steps will fall within it.

Methods to Record Service Plans

Recording Service Plans for Clients can be a laborious process for Users, but much of the work can be relieved by Administrators with system configuration.

There are four ways for Users to record Service Plans.

Use a Workflow to Create the Service Plan

A workflow is available to guide Users through the process of creating the Service Plans and then selecting the goals and goal step.

Use a Preset Service Plan

Preset Service Plans allow the User to select program related plans which automatically includes all the goals and goal steps.

Copy an Existing Service Plan

Another option is to copy an existing Service Plan. This is especially useful when plans have definitive end dates. A new plan can be easily recorded by copying a previous one and choosing to only include goals and/or steps which are not complete.

Create a Service Plan Manually

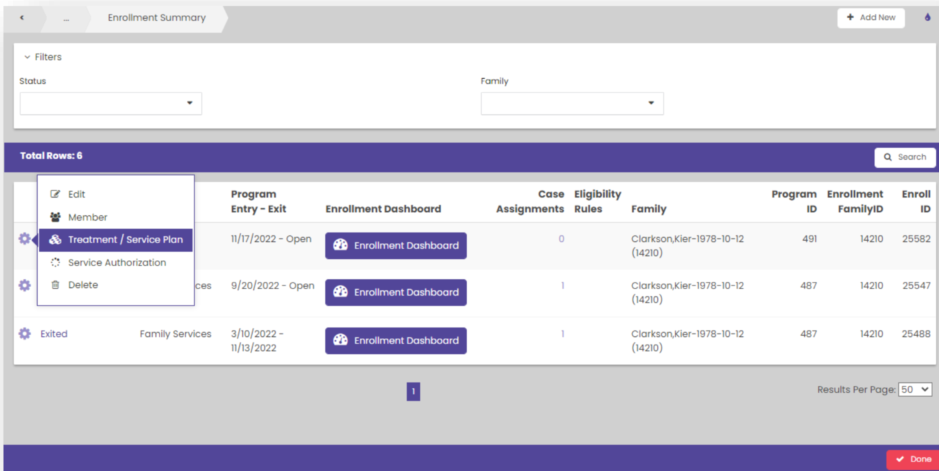
Finally, the ability to create a Service Plan and then associate the goals and goals steps manually is also available.

Initiating Service Plans

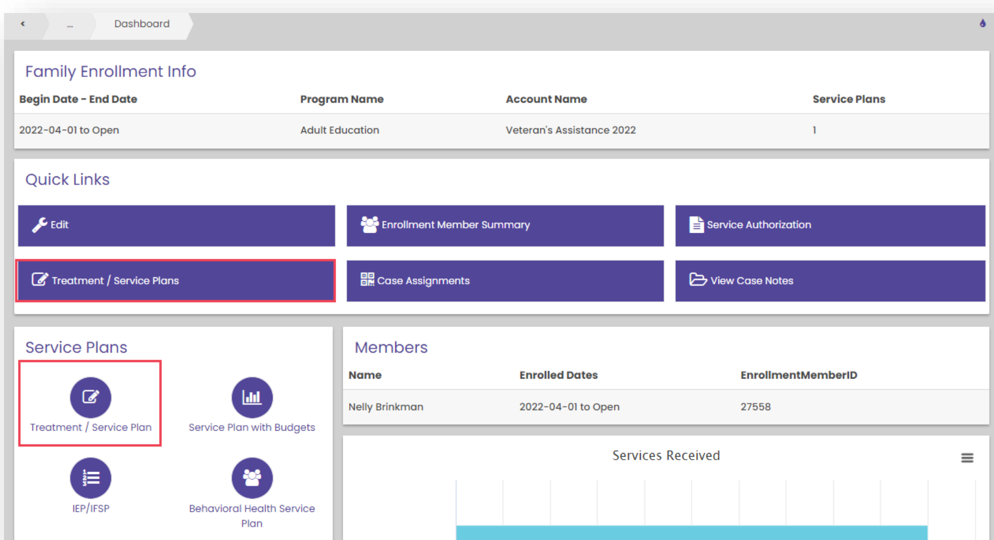
Service Plans are intended to assist Clients achieve goals while they are enrolled in programs, therefore they are associated with the Client's enrollment.

No matter which method of entry is used, they are all initiated using the *Enrollment Service Plan Summary* form, which is available a few different ways.

The first is from the program's action gear on the *Enrollment Summary* form.



The same form is also accessible from the *Enrollment Dashboard* using these two links.

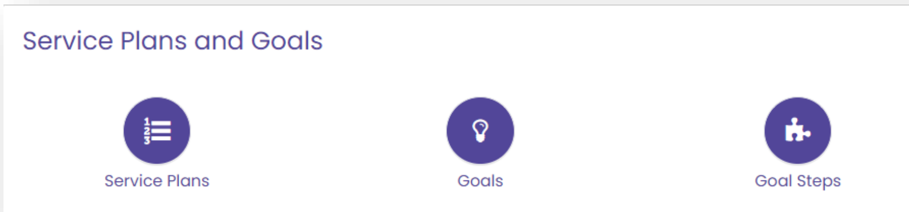


This concludes the *Service Plans Overview* video. In the next video, we will review the System Configuration that is necessary for Service Plan functionality.

System Configuration for Service Plans

This second video of the series details how to configure the necessary elements of a Service Plan and perform all necessary mappings.

The foundational elements of service plans are managed in Codes and Categories which is accessible from the Administration tab. The necessary links are grouped together.

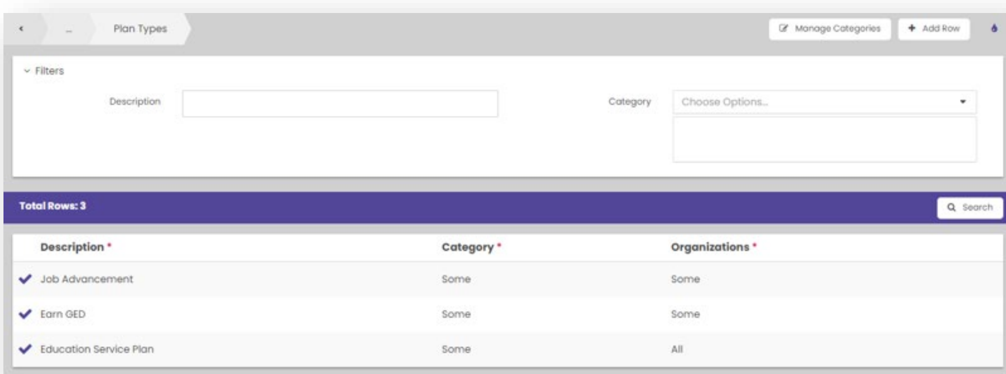


Service Plans are only necessary for the use of Preset Service Plans. While your CaseWorthy database does include baseline goals and goal steps, it does not include any Service Plans.

Service Plans

We will start with **Service Plans.**

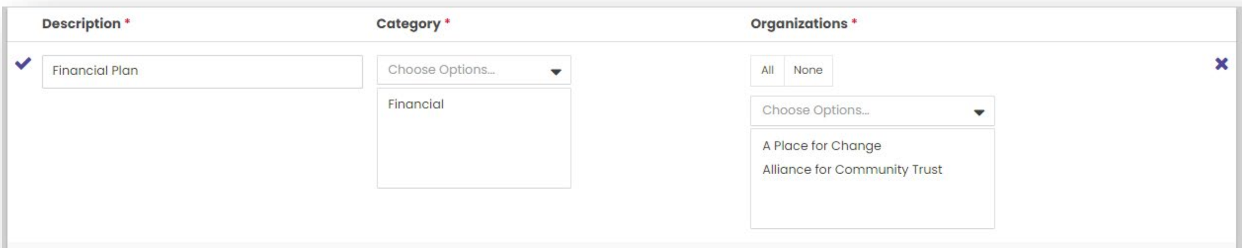
This element is only necessary for preset Service Plans as it essentially creates the file folder to which the goals and steps will be added. The other methods of recording plans do not use this element.



Previously created Service Plans display with their assigned categories and the Organizations that have access to the plans.

Before adding a new plan, ensure Categories are updated through MANAGE CATEGORIES. These categories are simply used as filters on forms and do not affect the functionality.

Now let us add a new plan. (ADD ROW)

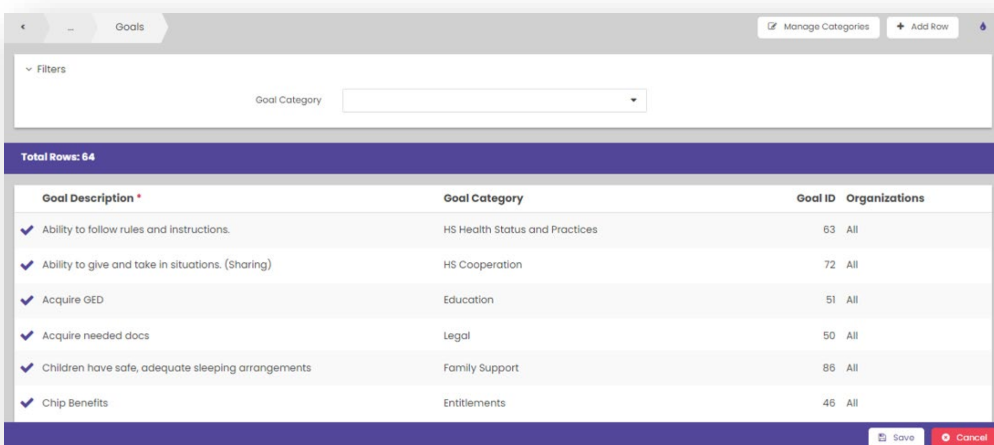


The plan itself is simply made up of a **Description**, may have multiple **Categories** for filtering, and can be made accessible by the Users of multiple **Organizations**.

Then, SAVE the Service Plan.

Create Goals

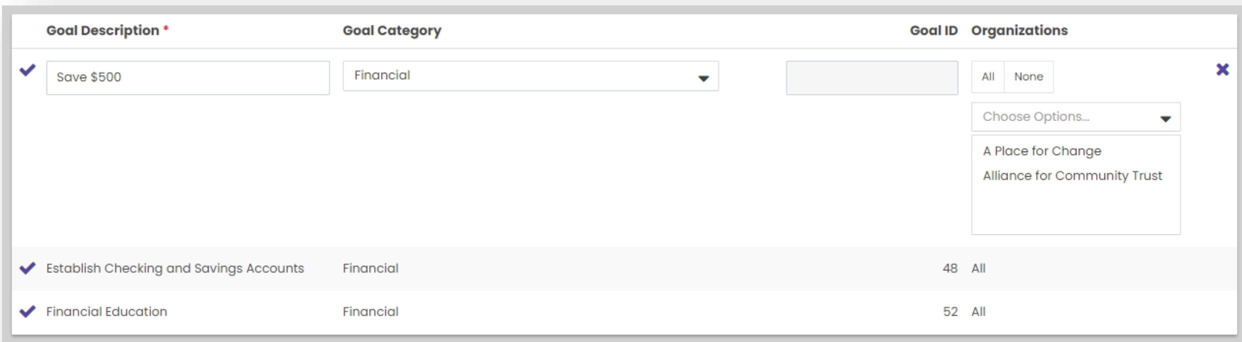
Next, let's cover goals which are necessary for all methods of entering plans for Clients. Navigate back to Codes and Categories, and then select **Goals**.



Your CaseWorthy database includes a multitude of goals when you first receive it, all of which are initially available to Users of all Organizations. Goals only belong to a single category.

Goals can be specific and detailed or can be larger and overarching.

Use the **Goal Category** filter to filter the results.



Notice I already have two goals in the financial category.

Remember, before adding new Goals, use MANAGE CATEGORIES as is necessary.

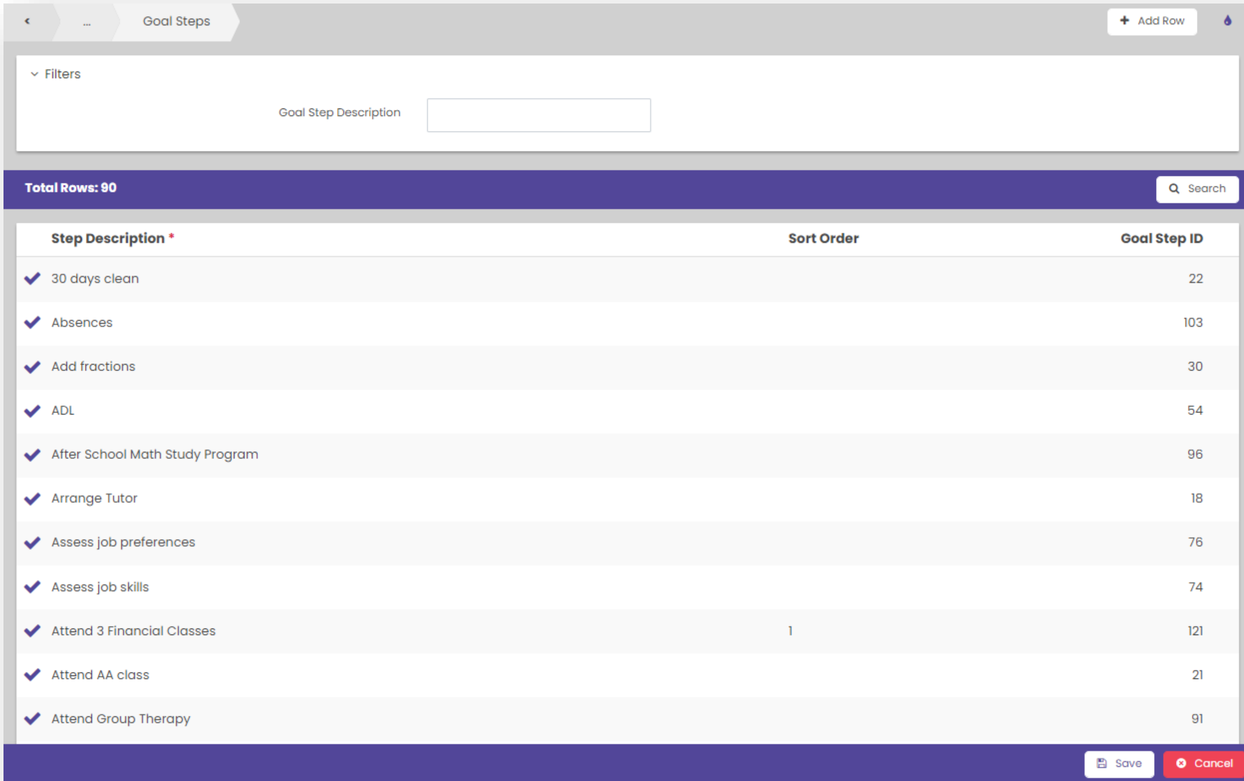
Let us add a third financial goal.

Enter a **Goal Description**, select a **Goal Category**, and associate one or more **Organizations** to have access to the Goal.

SAVE the form and then navigate back to the *Codes and Categories* dashboard.

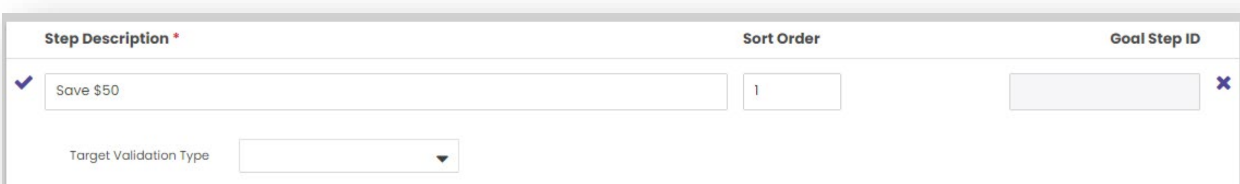
Create Goal Steps

The last element in service plans is **Goal Steps** which are also necessary for all methods of plan entry.



Again, your CaseWorthy database includes a multitude of goals steps as well. Like with services, these may require some tweaking to ensure they suit your needs.

Click the ADD ROW button to create new steps which are necessary for your goals. I need to create the goal steps for my new goal.

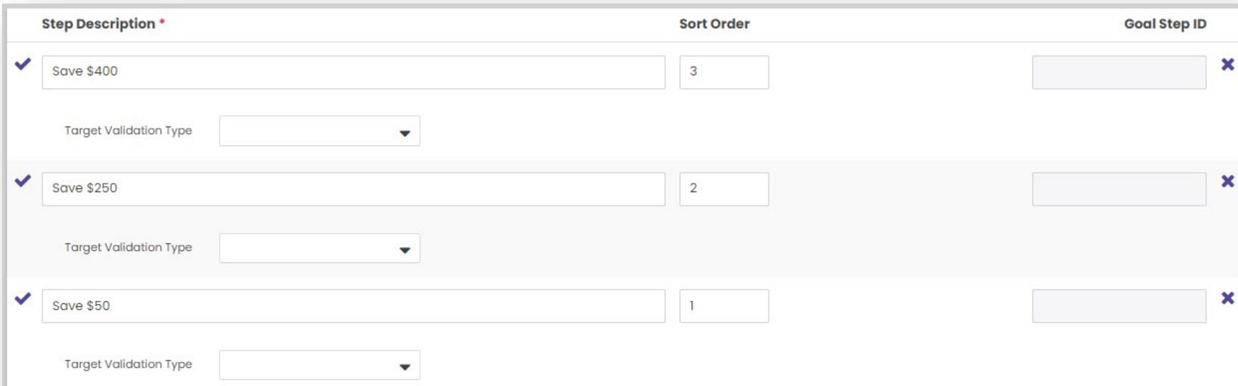


Enter the **Step Description**.

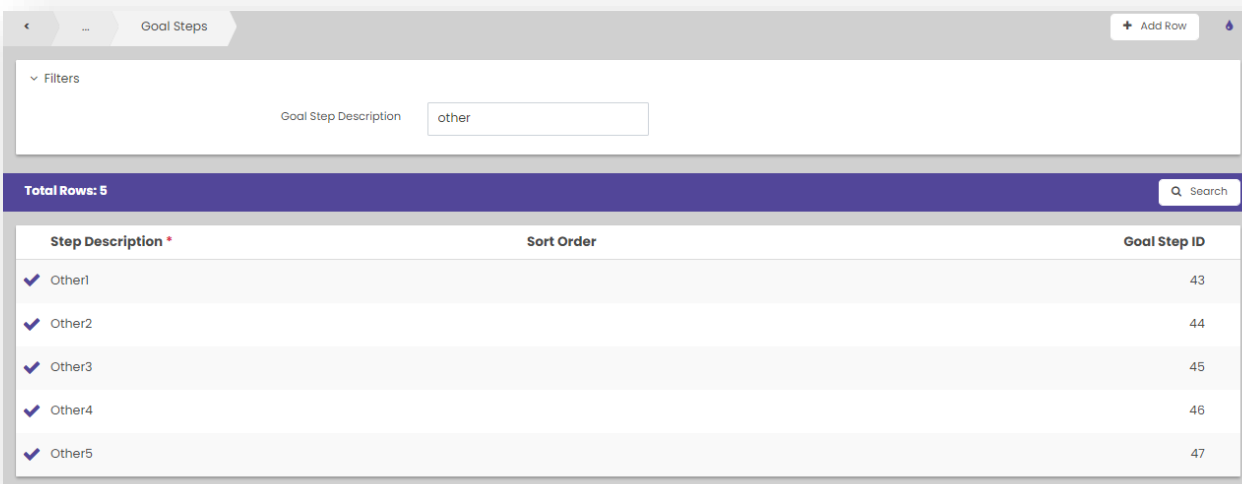
The **Sort Order** determines in what order the steps appear for Users when entering Service Plans.

The **Target Validation Type** metric is applicable only for Service Plans for Users rather than for Clients. SAVE the goal step.

Repeat the process for all necessary steps.



It is also important to note that if the description includes the word 'Other' it will allow the User to enter a custom description when creating Service Plans on the Case Management tab. Here, we already have multiple 'Other' Goal Step options created and available if needed.



SAVE when done.

Mapping

Once all necessary Service Plan elements are configured, mapping is necessary to associate the elements to one another and to programs.

The mapping of goals to goal steps is necessary for using the Service Plan functionality.

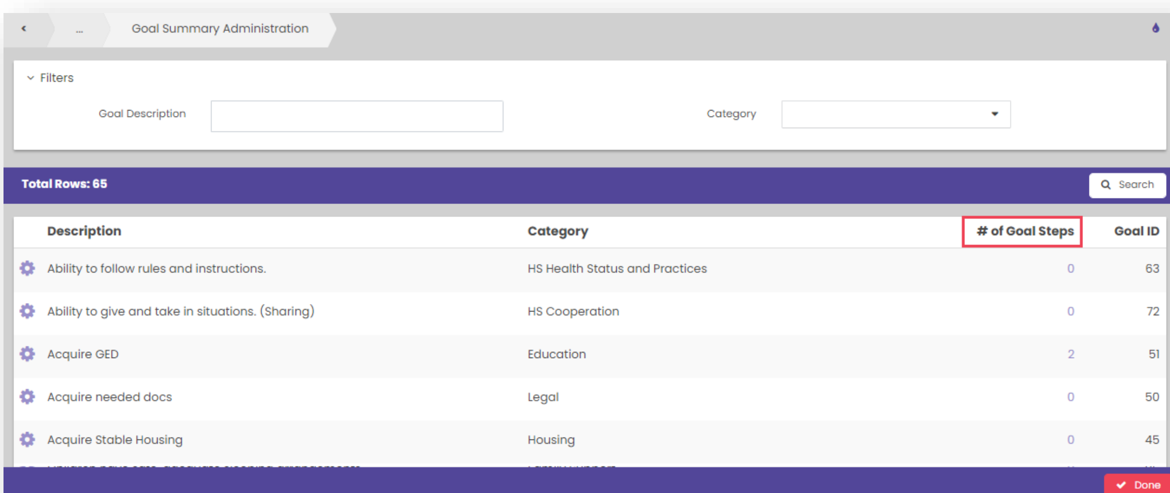
Program mapping is necessary for different reasons.

- Programs are mapped to Service Plans and goals for Preset Service Plan entry.
- Programs are mapped to goals to assist Users when using the workflow to enter a plan.
- Programs are mapped to outcomes so that Users can record outcomes for both the Service plan and individual goals.

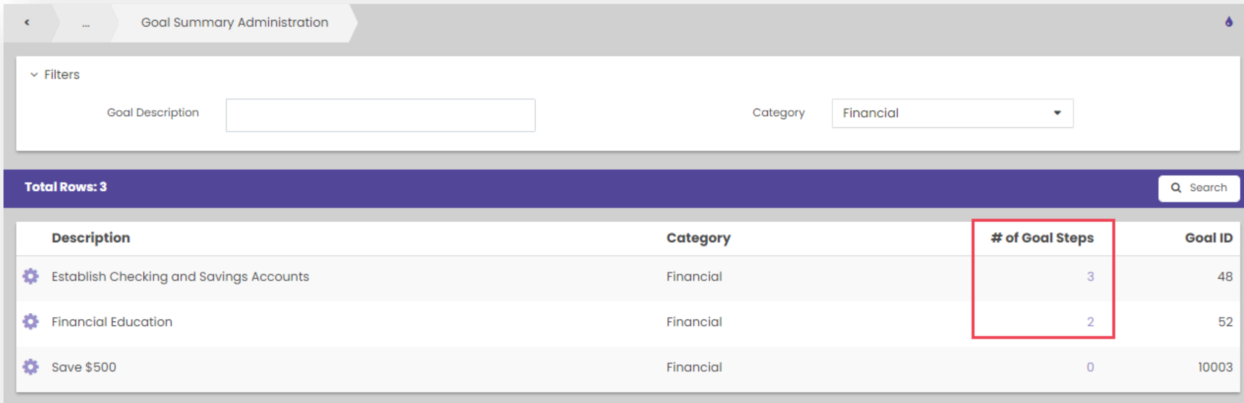
Mappings are performed on the Administration tab, Setup, and Mappings.

Goals to Goal Steps

While your database initially does have goal and goal steps, the mapping of goals to goal steps must be performed by a System Administrator. This is necessary for all service plan entry modes. Once done, the number of mapped goal steps is reflected here.

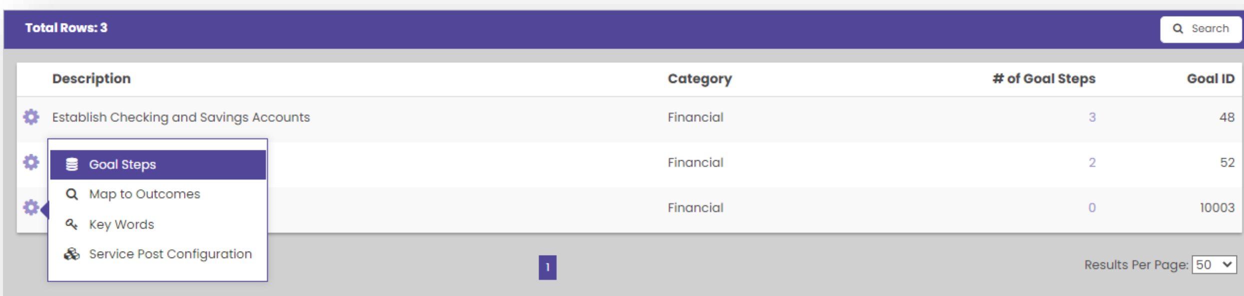


We're going to map our new goal to our new goal steps.



For our example, I have already mapped goal steps to two of our three goals.

Let us now map the steps to our third goal. From the goal's action gear, select **Goal Steps**.



Select each goal step that should be mapped to the goal.

The mapped goal steps are the only steps the User will have the option to select for this goal when entering the plan.

	Step Order *	Goal Step	Required *	Step Weight *	Target Days *	Restriction *	Goal Step ID
✔	4	Other1	No	0	0	Shared	
✔	1	Save $50	Yes	33	30	Shared	
✔	2	Save $250	Yes	33	90	Shared	
✔	3	Save $400	Yes	34	150	Shared	

Indicate the **Order** in which the steps should appear for the User on the Case Management tab.

The other attributes can be edited by the User when recording the Service Plan, but System Administrators can enter agency standards here.

If a goal step is set as **Required**, it will automatically be included when a service plan is entered. If the step is optional, set as not required, and the User will choose to include it if necessary.

If steps are set as 'Required' the **Step Weight** for the required steps must collectively equal 100 and indicates how important each step is to the Goal.

Target Days is used to indicate the number of days in which the step should be completed.

Once all goal steps are configured, SAVE the form. Repeat the goal step mapping process for all other goals.

I'm adding one 'Other' goal for the User to have the option to add something more specific for the Client's needs.

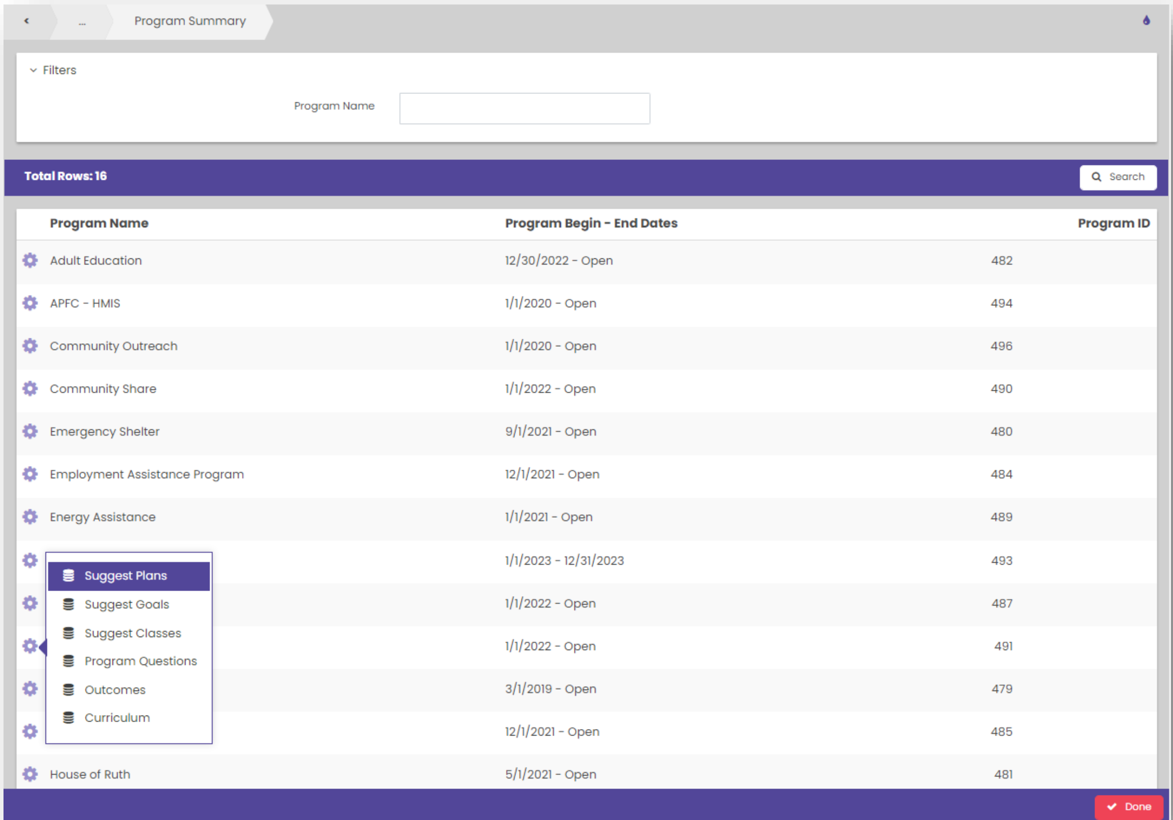
Once all Goal Steps are configured, SAVE the form. Repeat the goal step mapping process for all other goals.

Program to Service Plan

Preset Service Plans require mapping programs to Service Plans and goals which is performed in one process.

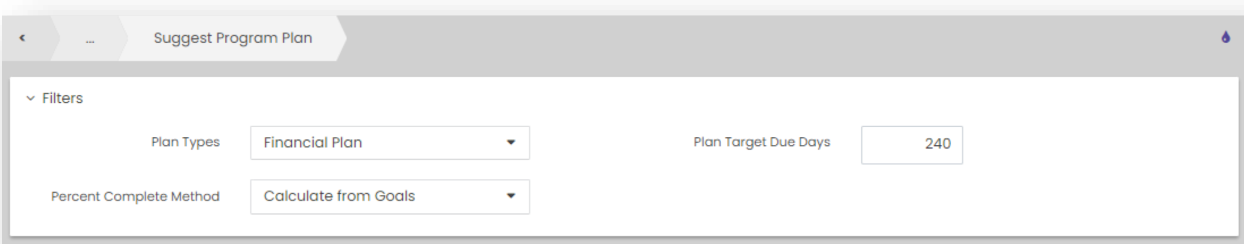
Navigate on the Administration tab to Setup, Mappings, and then select **Program**.

From the action gear of the appropriate program, select **Suggest Plans.**



Service Plan

Select ADD NEW. The top of the form is used to select the Service Plan while the bottom identifies the goals.



Any preset Service Plans that were created in Codes and Categories appear in the **Plan Types** dropdown for selection.

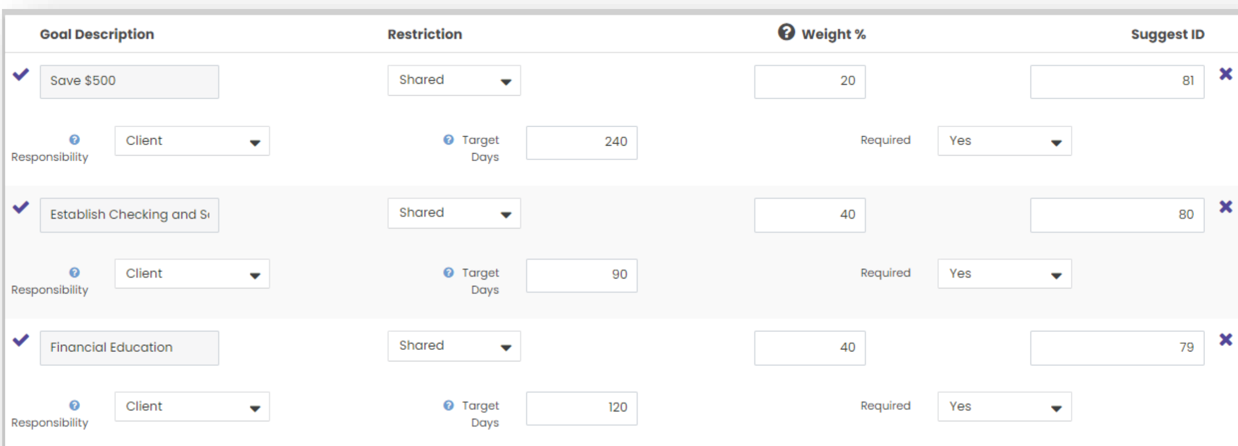
The number entered for **Plan Target Due Days** will be used to automatically calculate the Client's Service Plan end date. While this can be edited by the User, it is helpful to set an expected standard.

It is important to consider the lengths of time that were determined for each goal and its steps to ensure they are within the plan's allotted time.

The **Percent Complete Method** indicates how the Service Plan's 'Percent Complete' is automatically calculated as updates are made to goal and goal steps. Options include 'Calculate from Goals', 'Calculate from Steps', and 'Enter Percent Complete Manually'.

Service Plan Goals

Next, select the goals that should be included as part of this Service Plan. The list includes the goals we managed in Codes and Categories. Let us start with our first goal.



Restriction honors Organization level data sharing rules.

Responsibility is used to indicate who is responsible for accomplishing the goal. Options include the 'Client', 'Staff', or 'both' parties.

Target Days is used to indicate how many days in which the Client is required to complete the goal.

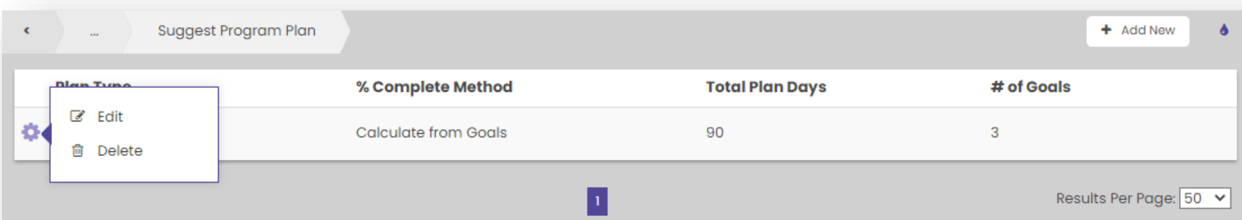
The **Weight %** field indicates the weight that the goal holds within the Service Plan. The sum for all Goals Weight % are required to equal 100%.

If a step is set as **Required**, it will automatically be added to the Preset plan when recorded for a Client.

Continue adding goals to the plan as necessary.

When entering this Preset Service Plan, the User will have access to include all of the goal steps which are mapped to the included goals.

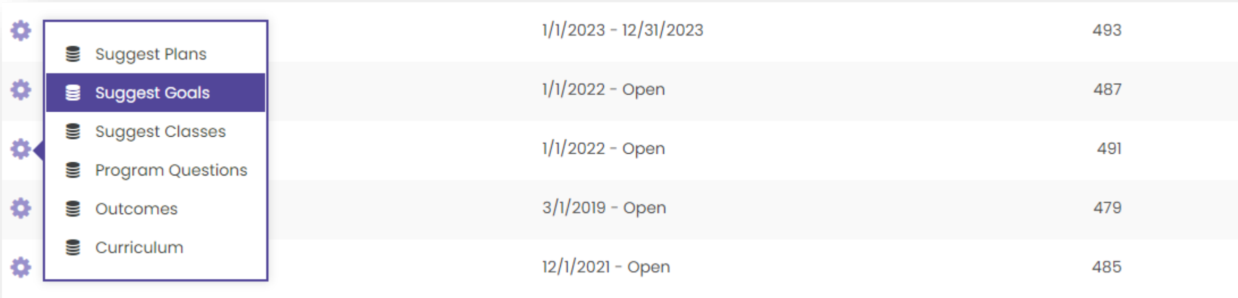
From the Program's Service Plan action gear, **Edit** is available to update the goals, and **Delete** will remove the Preset Service Plan association to the program.



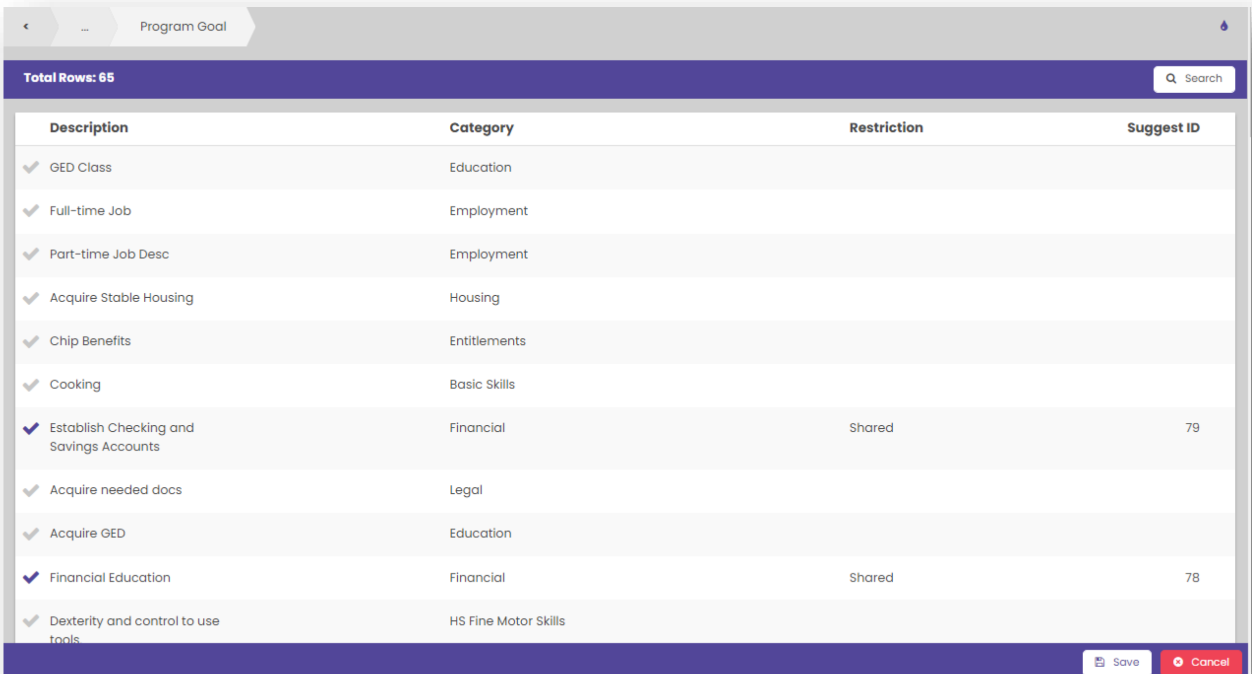
Program to Goal

Goals are mapped to programs to make the process of creating Service Plans easier for Users when using the workflow.

From the program's action gear, select **Suggest Goals**.

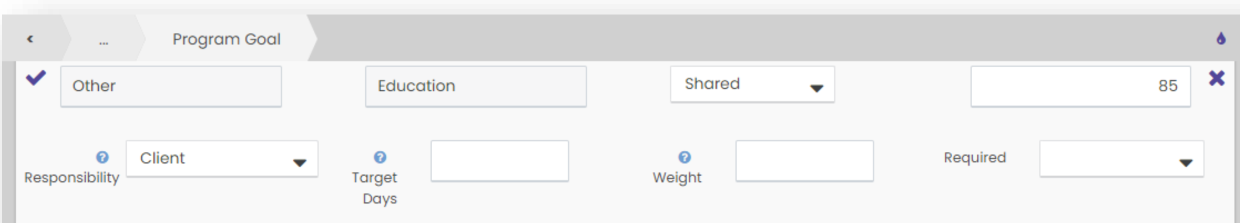


Notice any goals mapped through a preset service plan display as associated to the program.



Description	Category	Restriction	Suggest ID
GED Class	Education		
Full-time Job	Employment		
Part-time Job Desc	Employment		
Acquire Stable Housing	Housing		
Chip Benefits	Entitlements		
Cooking	Basic Skills		
Establish Checking and Savings Accounts	Financial	Shared	79
Acquire needed docs	Legal		
Acquire GED	Education		
Financial Education	Financial	Shared	78
Dexterity and control to use tools	HS Fine Motor Skills		

Additional goals can be added. I'm going to add a generic 'Other' goal.



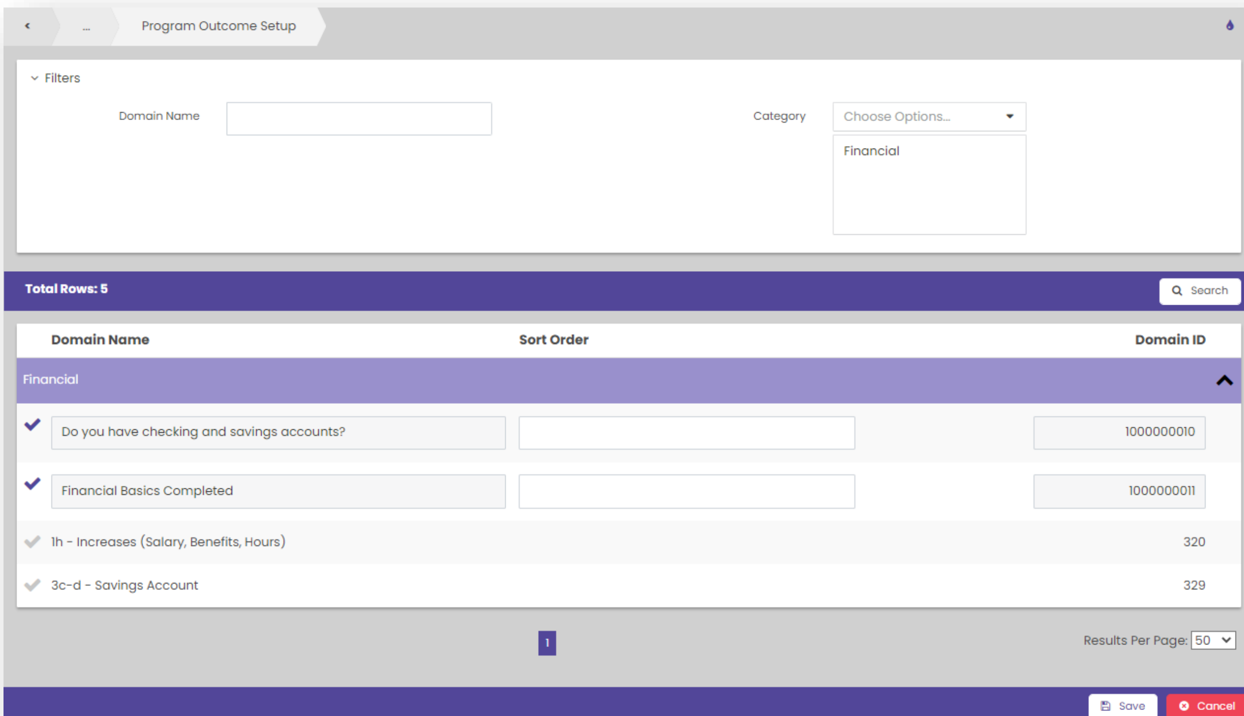
Programs to Outcomes

Users can record Outcomes for Service Plans and for specific goals. Outcomes are typically recorded when updating the Client's progress to note completion.

Outcomes which are mapped to programs will be available for selection when editing any program related service plan and any goal.

From Mappings select Program.

From the program's action gear, select **Outcomes**. All outcomes with categories are available for selection.



See the *Outcomes* video series to learn more about creating outcome domains.

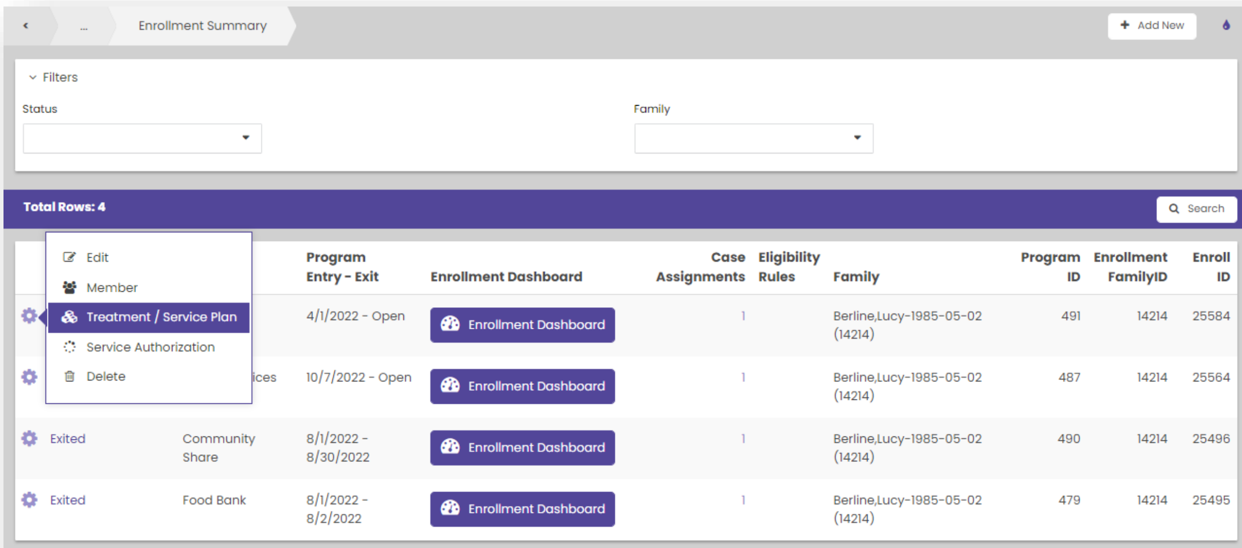
This concludes the *System Configuration for Service Plans* video. In the next video, we will explore using the Service Plan Workflow in Case Management.

Service Plan Workflow

In this third video of the *Service Plans* video series, we will explore the *Service Plan Workflow* which is one method to record service plans for Clients.

Navigate on Case Management tab to Case Management, Program Enrollments, **Program Enrollments**.

Service Plans are intended to assist Clients achieve goals while they are enrolled in programs, therefore they are associated with the Client's enrollment. Service Plans can be entered from the enrollment action gear.



Select **Treatment / Service Plan**.

Launch Service Plan Workflow

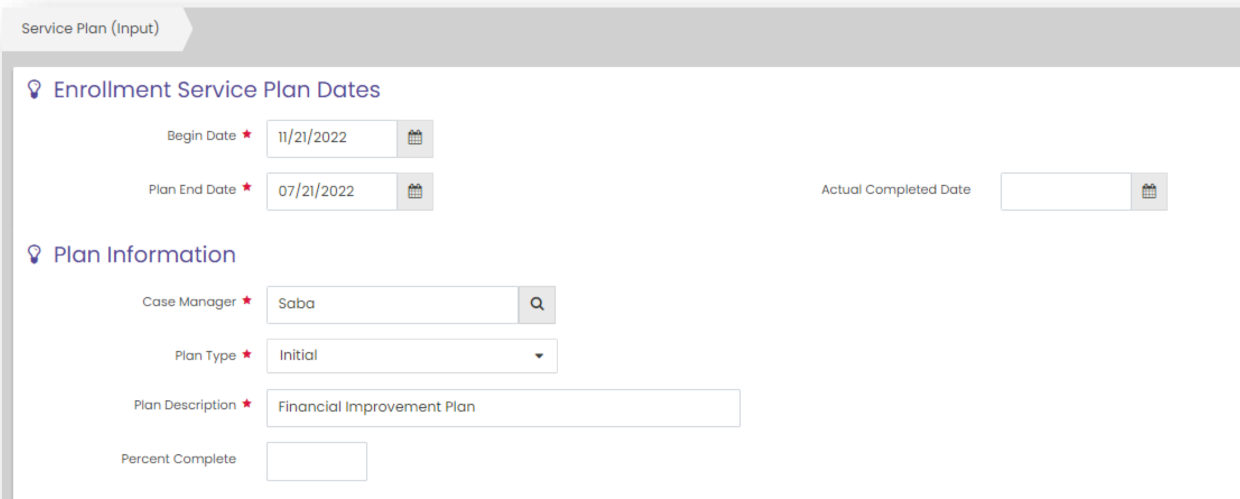
All Service Plans are initiated from this form. Click ADD NEW WORKFLOW to launch the *Service Plan Workflow*.

Systemwide, workflows are intended to assist Users in the entry of Client data by providing a streamlined process.

The *Service Plan Workflow* is used to create Service Plans and select goals. Database configuration, specifically mapping programs to goals, can assist in making the process easier.

Service Plan (Input)

The first step is used to enter information about the Service Plan itself.



Enter a **Begin Date** and expected **Plan End Date.** As is true throughout the application, 12/31/9999 can be used to indicate an 'Open' **End Date**.

The **Actual Completed Date** is updated when they are done.

IMPORTANT: It is important to understand that the Service Plan is marked as fully completed when the **Actual Completed Date** is a date equal to or earlier than the current date AND when **Percent Complete** is 100. These values are updated manually and not automatically by the system.

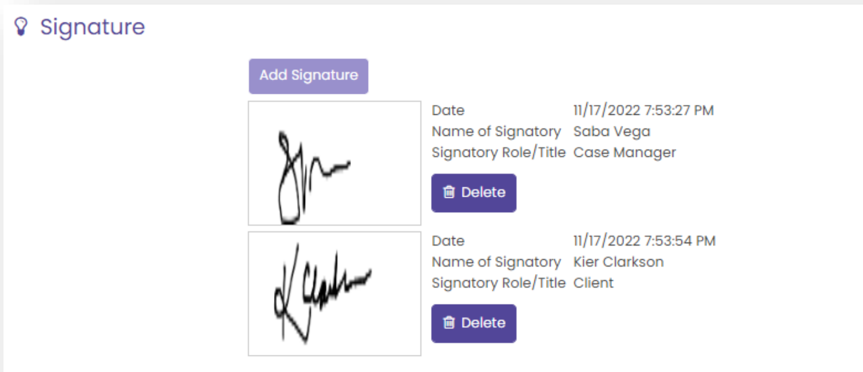
Next, add information about the plan. The **Case Manager** will default to the current User. Use the lookup to select a different Case Manager, if necessary.

Use the **Plan Type** dropdown to specify whether this plan is an 'Initial plan' versus a 'Plan Renewal', or any other type listed.

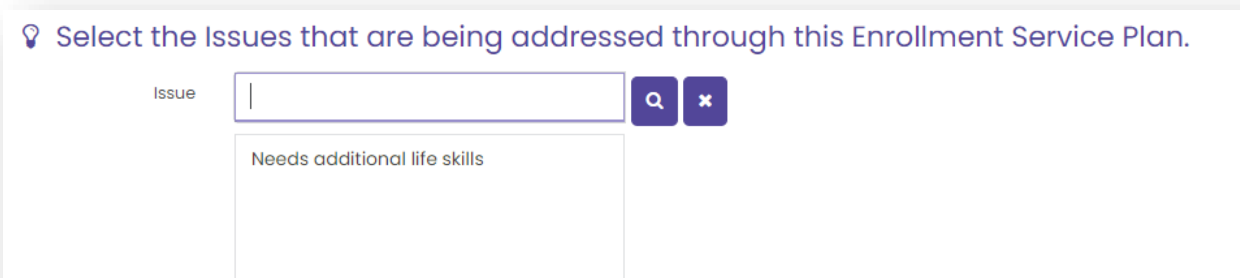
Enter a **Plan Description** by which Users can identify the plan.

Again, **Percent Complete** will be used to manually note the progress during the course of the plan.

Signatures can be captured for the Client and the Case Manager.

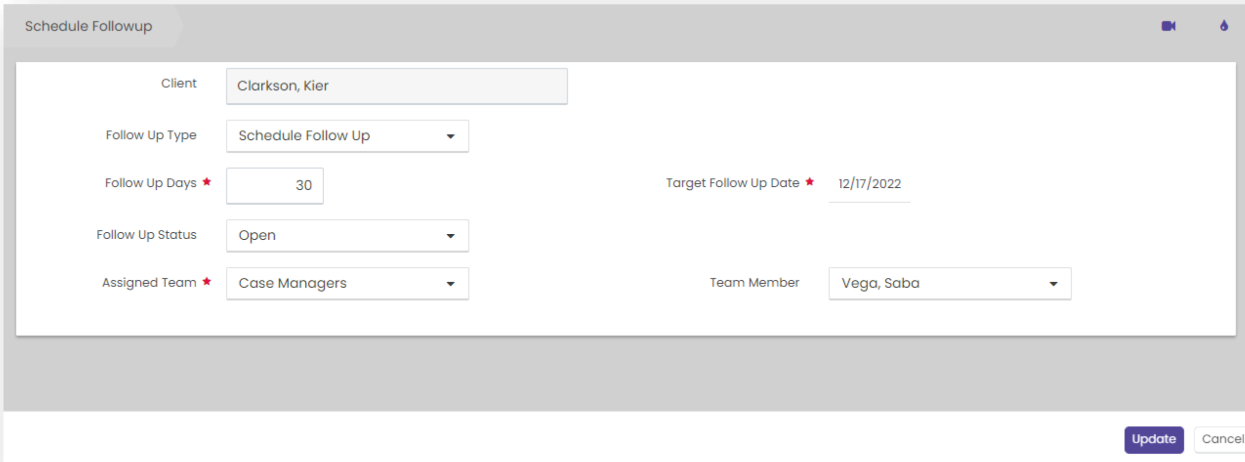


Presenting **Issue(s)** can be associated to the plan using the lookup.



Issues will display here if they are recorded on the Client's record. Issues are entered on the Case Management tab through Case Management, Presenting Issues.

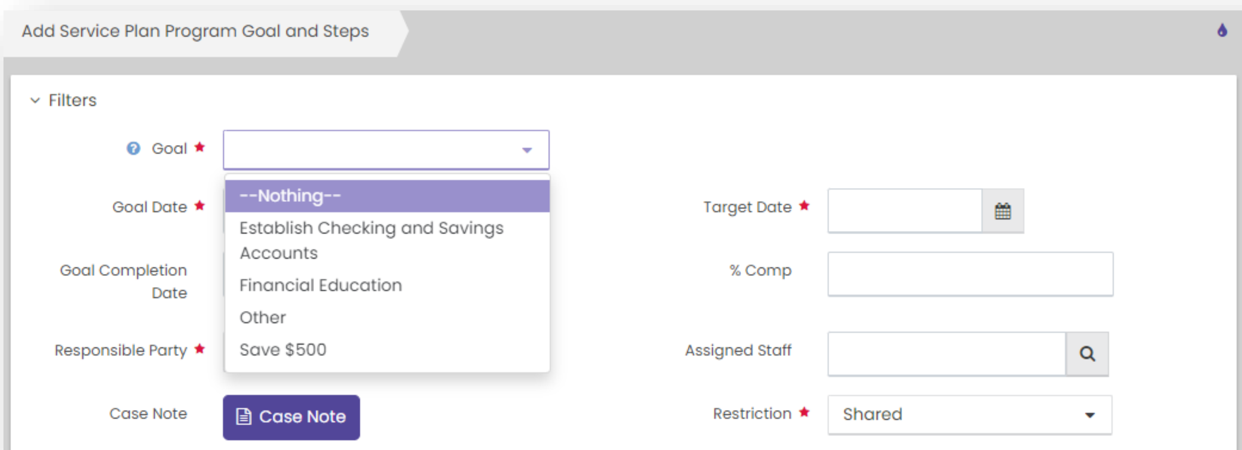
Follow-Ups are available throughout the application to help set reminders on various calendars.



Within Service Plans, a follow-up can be recorded to remind the Case Manager to check in on the Client's plan progress. (SAVE)

Add Service Plan Program Goal and Steps

The next step is used to record the first goal and associated goal steps for the Service Plan.

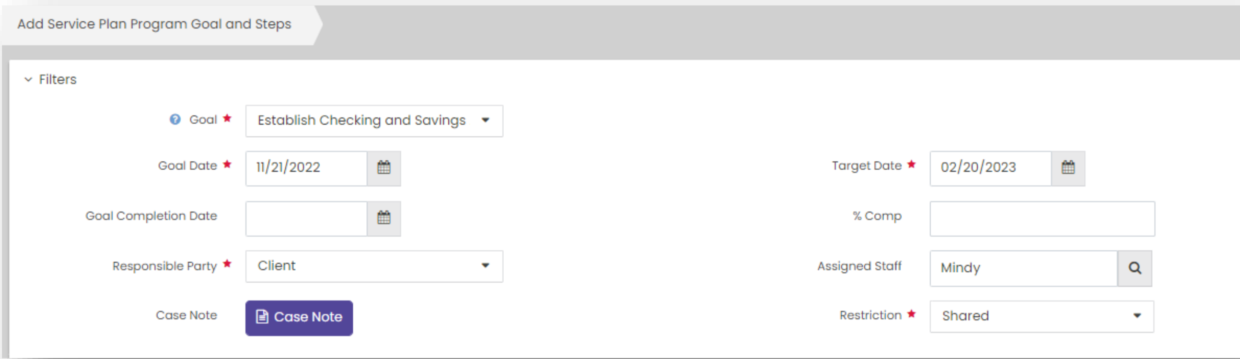


Notice that the only **Goals** that appear here are those which were mapped to the program by a System Administrator. This makes it easier for the User to review and select.

If a necessary goal is not listed, you will have an opportunity to access a list of all available goals in a later step.

TIP: If none of the program's goals are needed, click CANCEL to move to the next step.

Select the first **Goal** you wish to include in the plan.



The **Goal Date** will default to the current date and represents when the goal is assigned to the Client.

The **Target Date** is the date by which the goal should be accomplished.

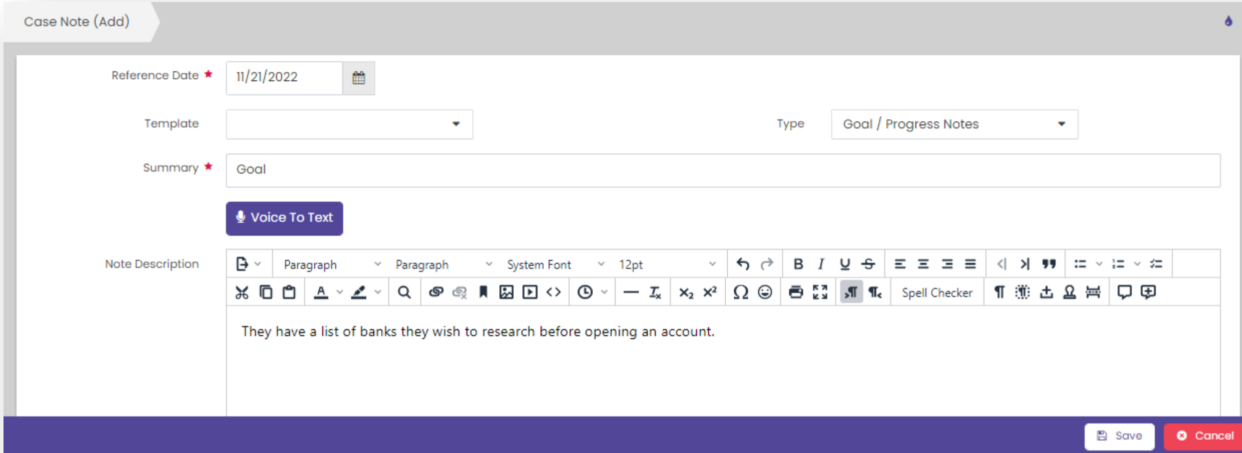
Goal Completion Date will be entered when the Client accomplishes the goal by completing all of the necessary goal steps.

Percentage Complete can be recorded as the Client is progressing towards completion or just when done.

Enter who is responsible for the accomplishment of the goal in **Responsible Party**.

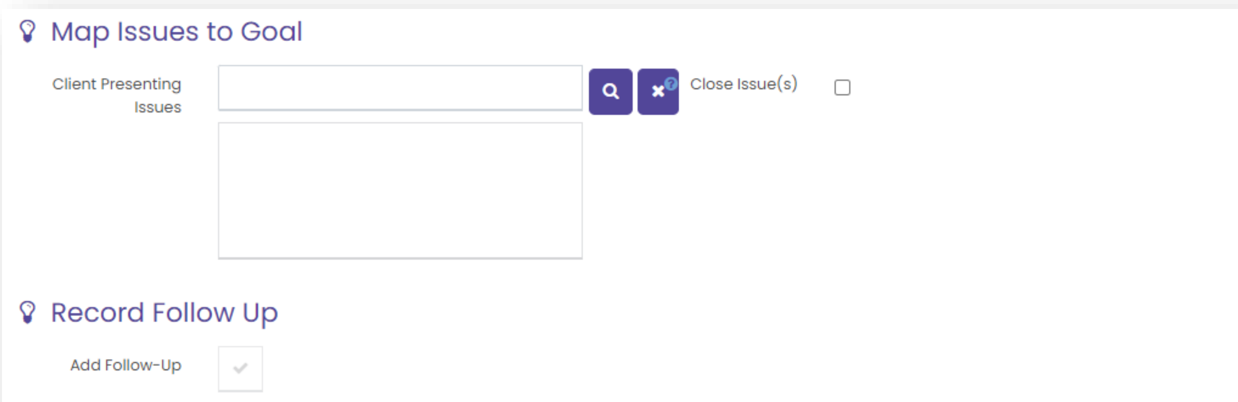
The **Assigned Staff** field can be used to record a staff member, other than the Case Manager, who may assist the Client with this goal.

Record a CASE NOTE for the Service Plan if desired.



Notice that the Case Note's **Type** and **Summary** default to be associated with the goal.

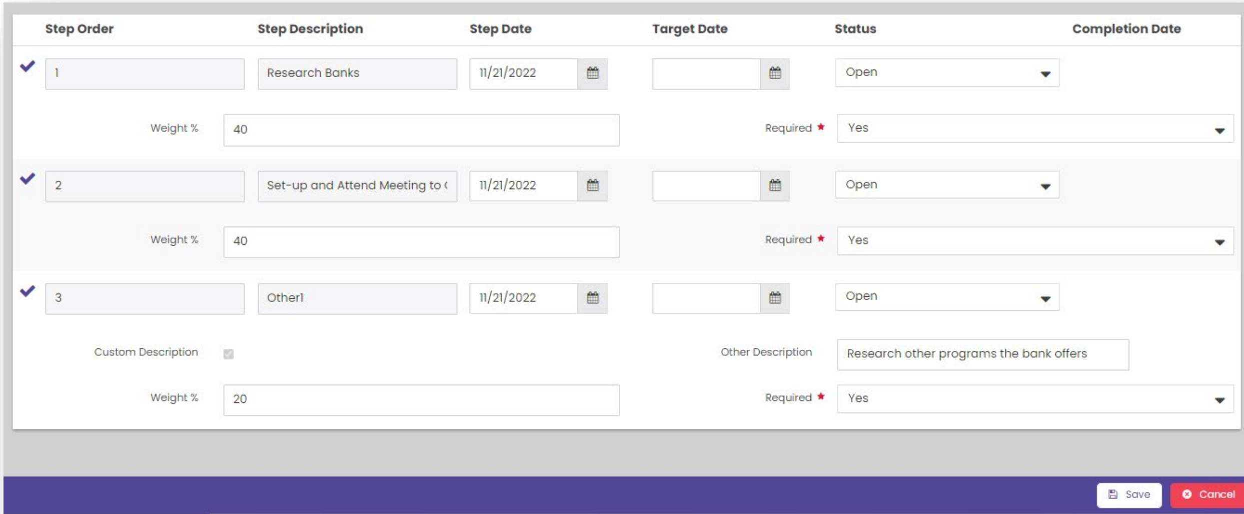
Presenting Issues and **Follow-Ups** can be noted at the goal level too, if required.



At the bottom of the form, all goal steps which were mapped to the goal by the System Administrator display for selection.

Details which were entered in the goal to step mapping process display, but they can be edited.

To include a goal step, select the record.



The **Step Date** defaults to the current date and represents when the goal step is assigned to the Client.

The **Target Date** can be used to indicate when the Client is expected to complete the step.

The **Status** can later be updated to note the Client's progress.

When the status is updated to 'Completed', a **Completion Date** will be recorded.

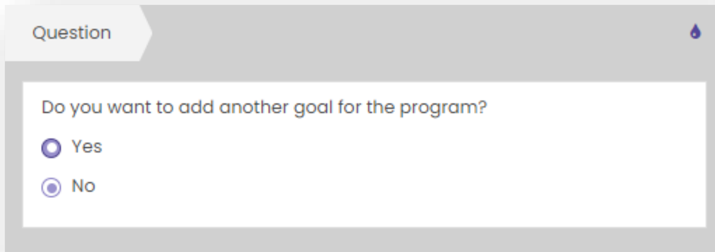
The step's weight and requirements default to the values set during the goal step mapping process, but the User can choose to change them. Remember, all the required steps should have a total weight of 100%.

Recall during setup that System Administrators can choose to include generic goal steps by entering 'Other' as the description. This allows the Case Manager to include steps which meet the Client's specific needs. If a generic goal step is included, the **Custom Description** checkbox is selected, and a description can be entered.

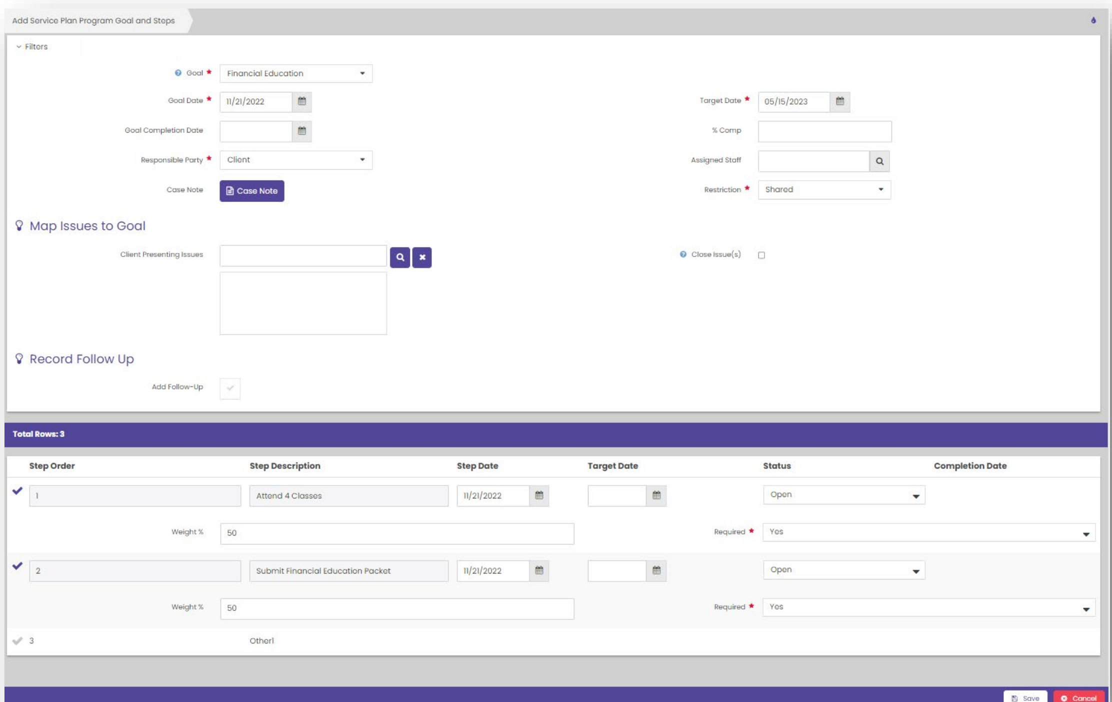
Click SAVE to save and move to the next step in the workflow.

Question – Add a Program Goal

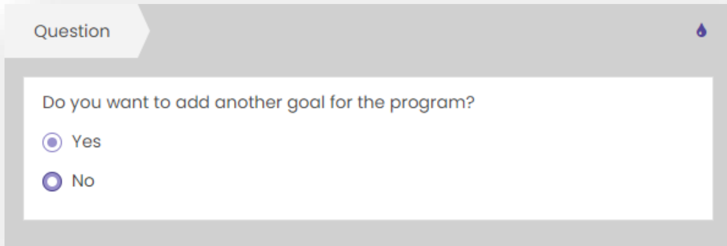
If you would like to add another program specific goal, select 'Yes'.



Selecting 'Yes' presents the same form which allows you to add an additional program goal and related steps to the Service Plan.

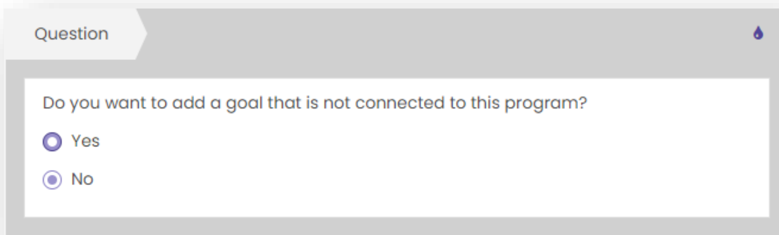


Once you have added all necessary program goals, select 'No'.



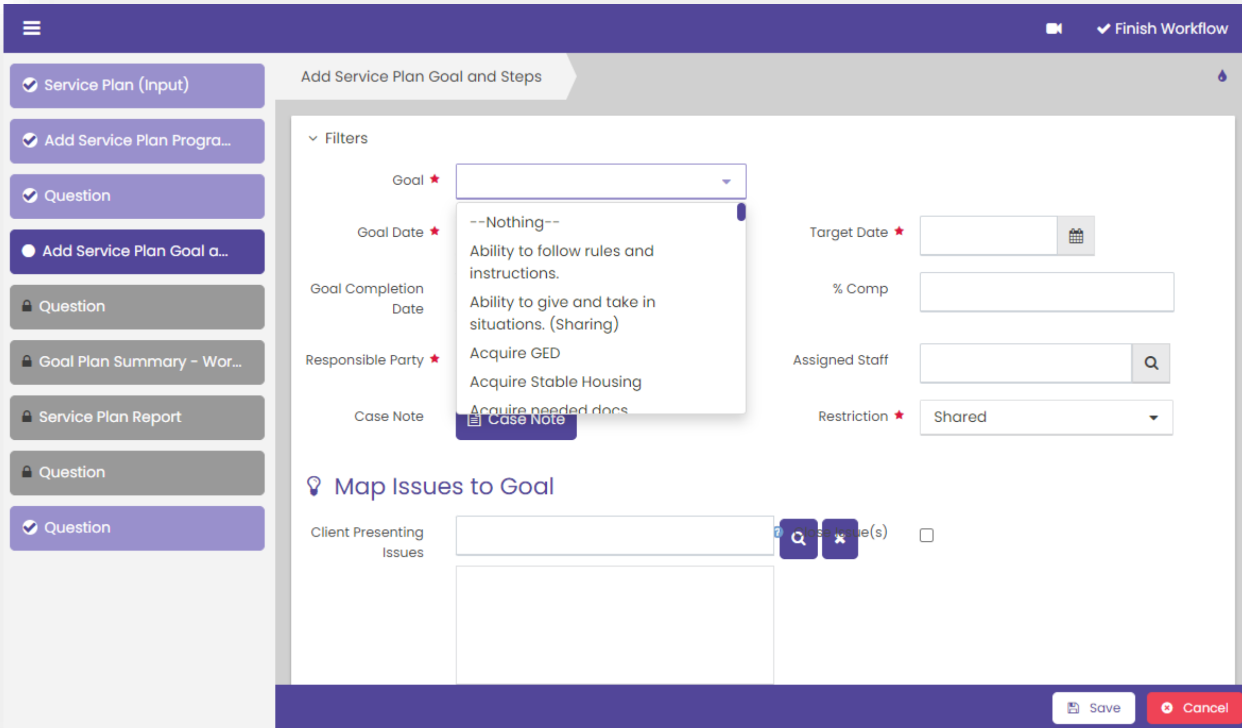
Question – Add Any Goal

Now you are asked if you'd like to add any other goals which weren't specific to the program, to the service plan.



If you would like to associate a goal that is not connected to the program, select 'Yes'.

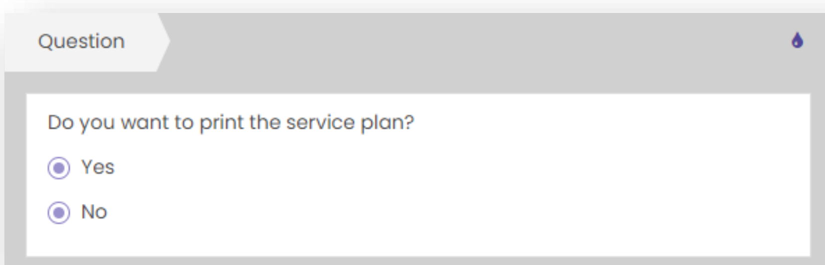
The workflow will present a similar form, but all goals will be available for selection.



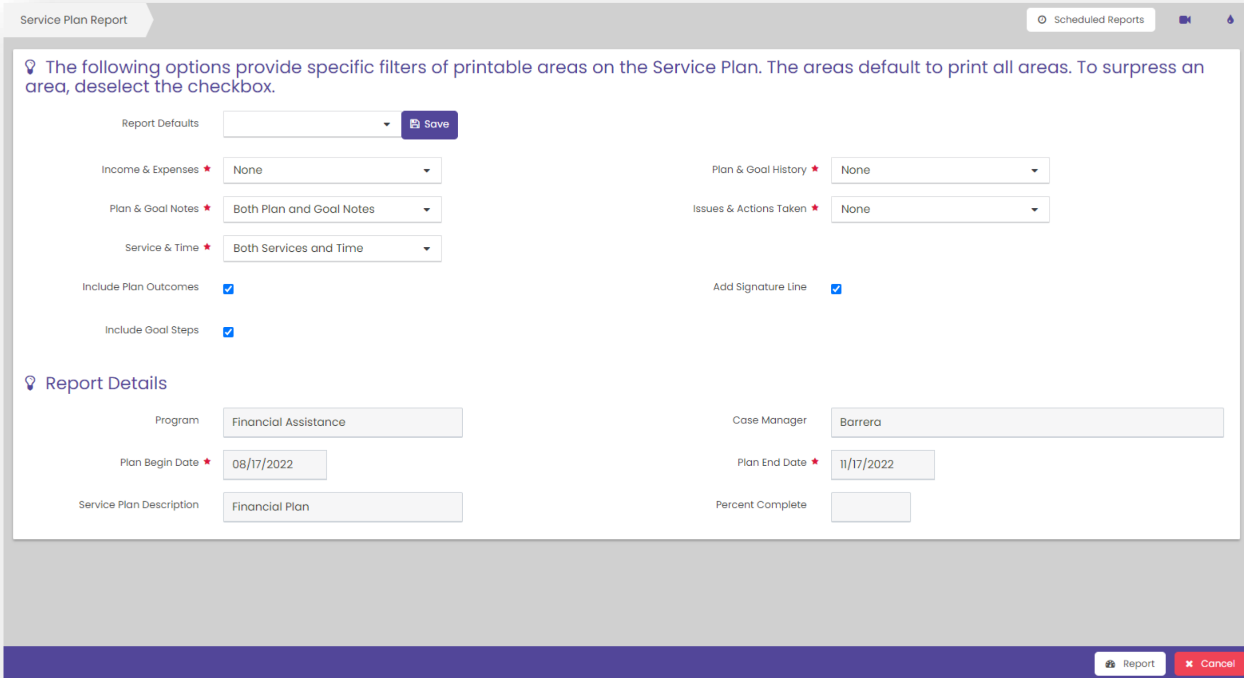
Otherwise, select ‘No’ and SAVE.

Question - Service Plan Report

The next question asks if you’d like print the service plan.



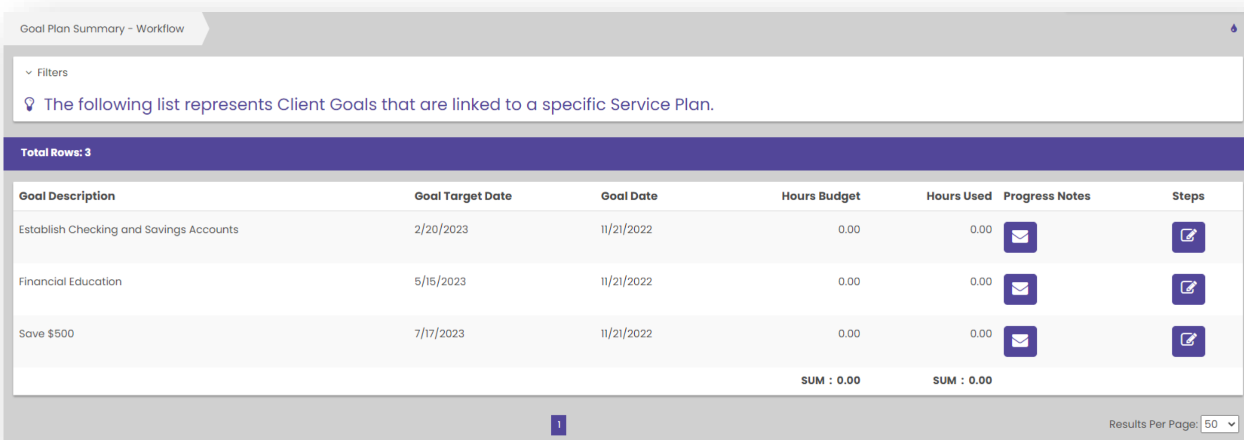
If ‘Yes’, the next step presents the *Service Plan Report’s* parameters.



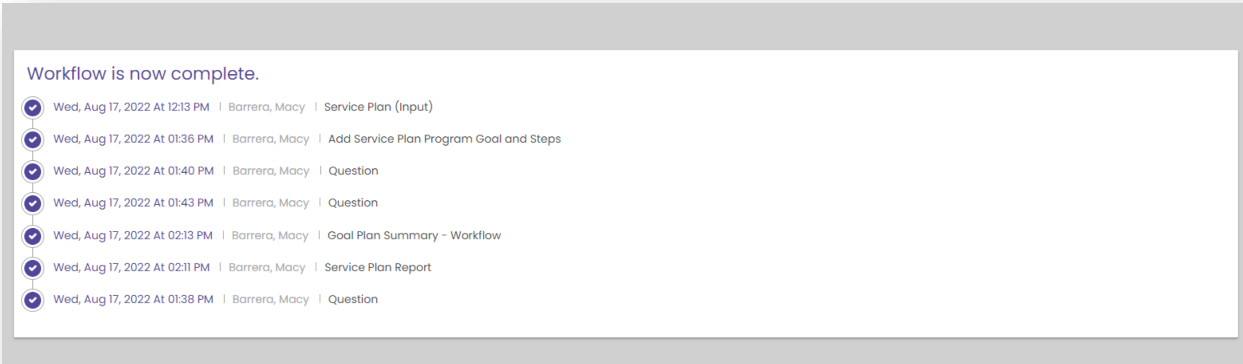
See the *[Service Plan Report](#)* video later in the series for more information about how to configure the report.

Goal Plan Summary

This step lists the Service Plan’s goals as well as other details.



Click DONE to complete the workflow.



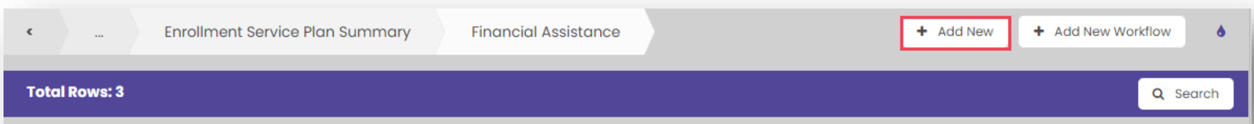
This concludes the *Service Plan Workflow* video. The next video in the series details how to enter Preset Service Plans and how to create a new service plan from a copy of an existing plan.

Preset Service Plans and Copying Existing Plans

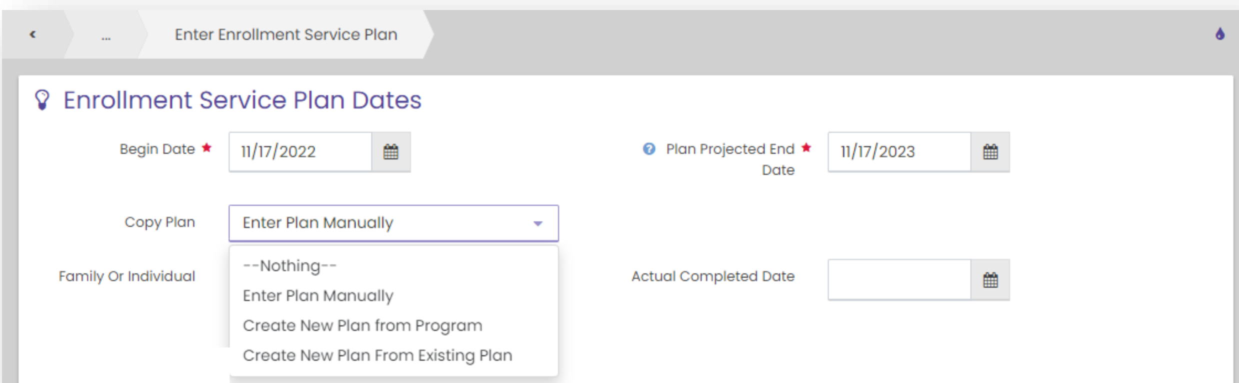
This fourth video of the *Service Plans* video series details how to enter preset Service Plans and how to create a new service plan from a copy of an existing plan.

No matter which method is used to enter a Service Plan, all plans are initiated from the same form.

Navigate on the Case Management tab, to Case Management, Program Enrollments, and then **Program Enrollments**. Off the Program's action gear, select **Treatment/Service Plan**.



The other three methods of entry are performed using ADD NEW.



The **Begin Date** defaults to the current date, and the **Plan Projected End Date** defaults to one year from the current date but can be edited.

Select how you would like to create your Service Plan in the **Copy Plan** drop-down.

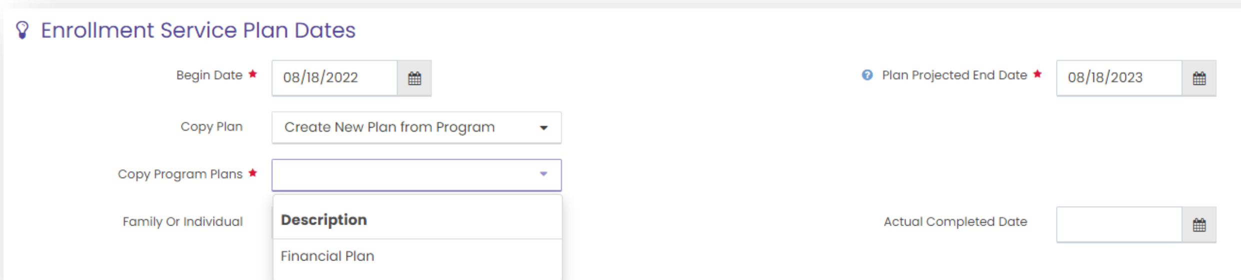
Enter Plan Manually

'Enter Plan Manually' is the most laborious way to create a Service Plan. The Service Plan itself is first created using this form.

Then, from the *Enrollment Service Summary* form, the User will need to add goals with goal steps from the plan's action gear.

Entering Preset Service Plans

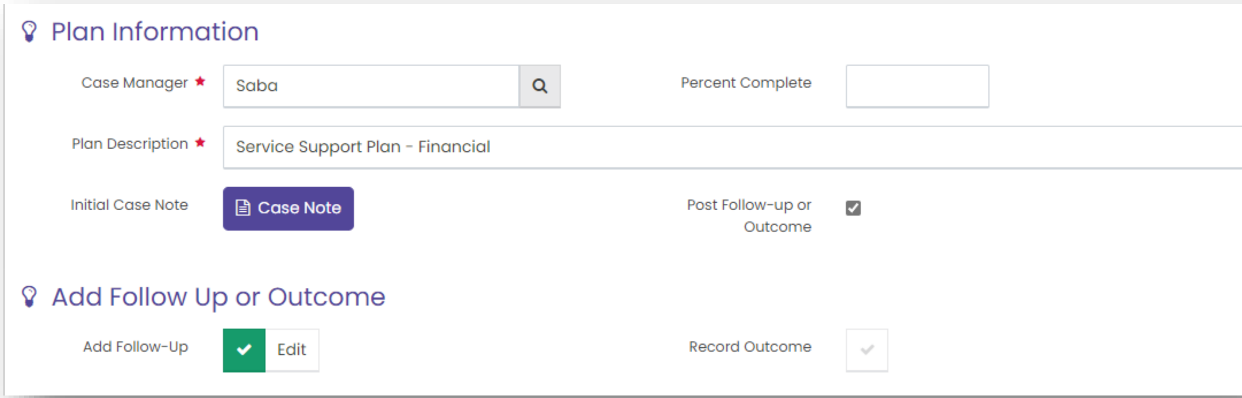
The next option is 'Create New Plan from Program' which is how Users enter preset Service Plans.



Service Plans which have been mapped to the program are available for selection in **Copy Program Plans**.

The **Family or Individual** field is purely informational and is used to indicate whether the Service Plan applies to the whole family, just the individual or both.

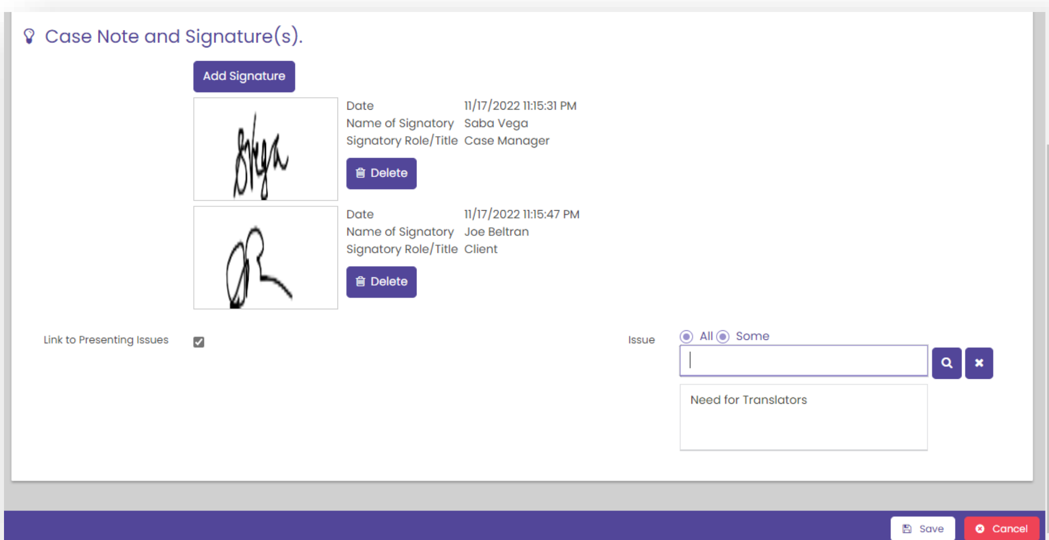
Again, the **Actual Completed Date** will be updated as the Client progresses through the plan or just when they complete it.



The Plan Information section is used to record additional details. The **Case Manager** defaults to the User but can be changed. The **Plan Description** defaults but can edited to be more specific. The Initial plan CASE NOTE can be recorded.

To include a follow-up and/or an outcome, select the checkbox.

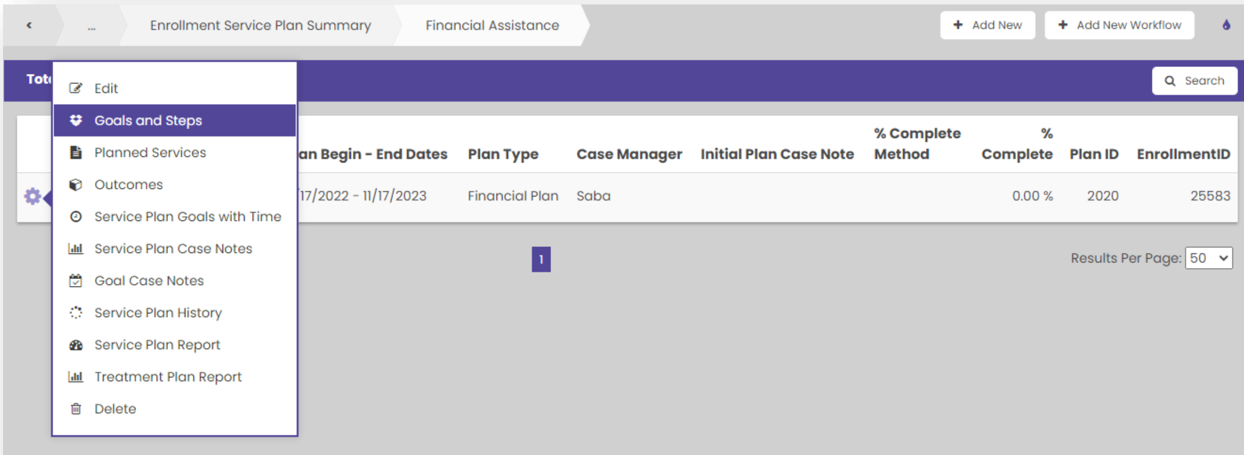
Percent Complete and **Outcomes** are typically added when this record is updated later.



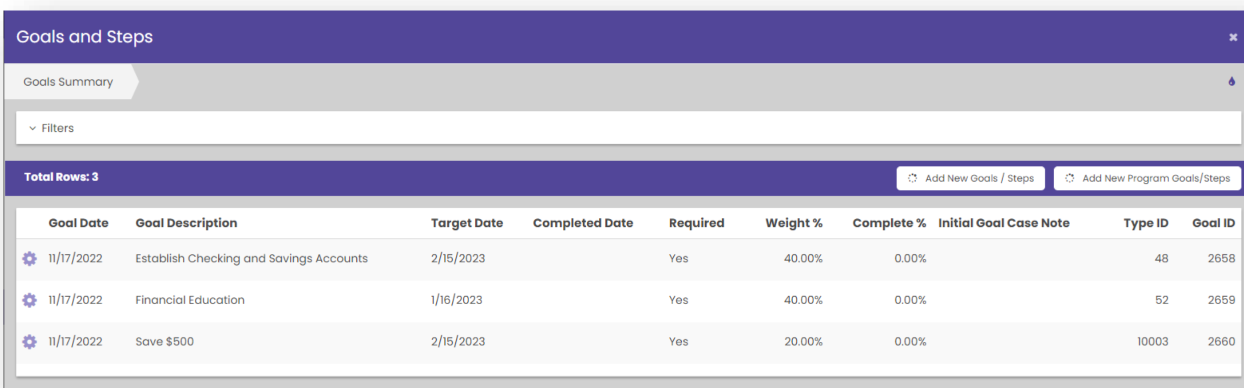
Lastly, **Signatures** can be recorded and **Presenting Issues** can be associated to the plan.

Click SAVE when done.

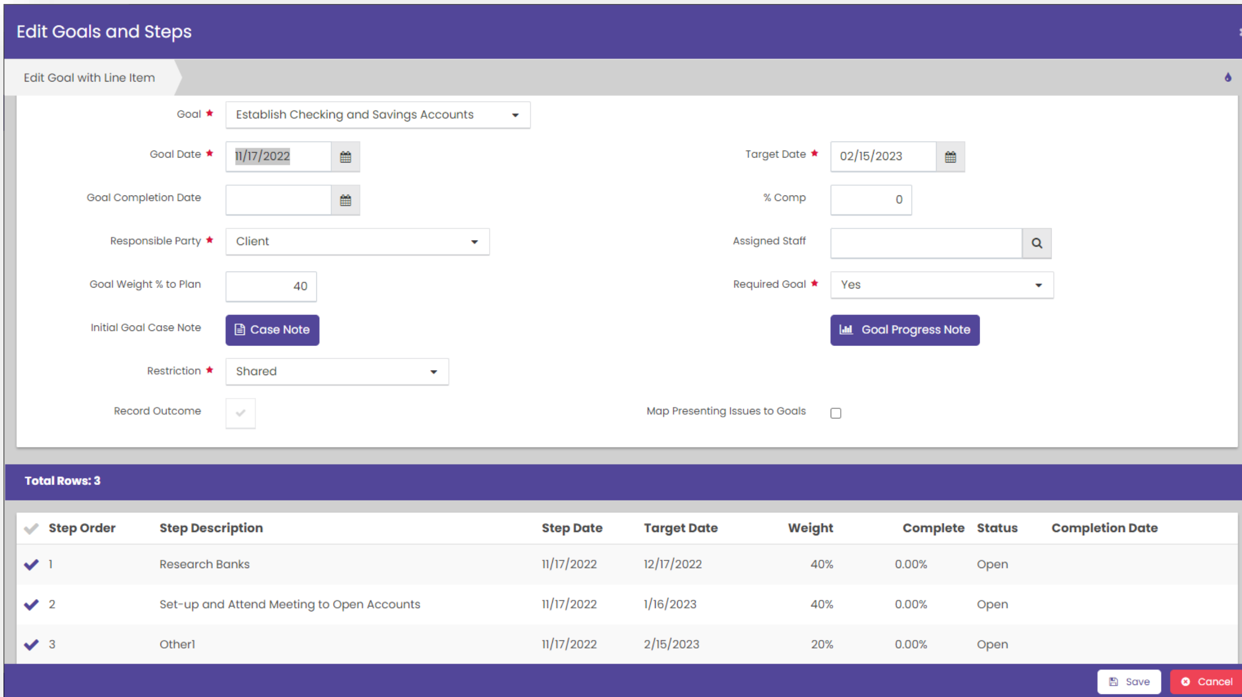
Let's see the benefit of using Preset Service Plans. On the *Enrollment Service Plan Summary* form, select **Goals and Steps** from the plan's action gear.



Here we see how the goals which were included in the [mapping of the program to the service plan] are automatically associated when the plan is created.



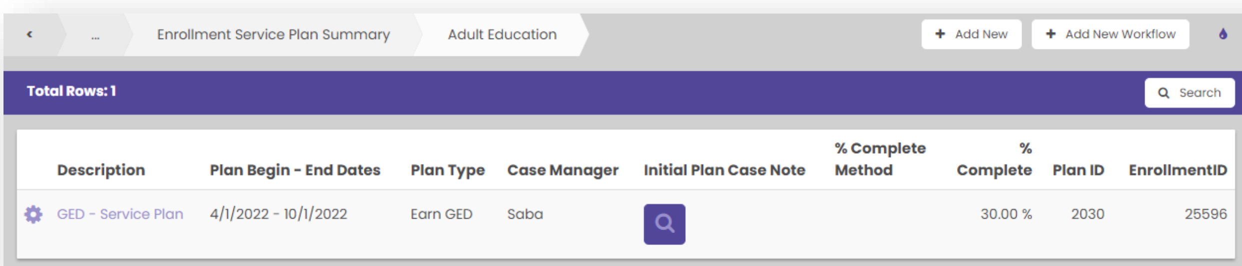
Each [goal includes its mapped goal steps].



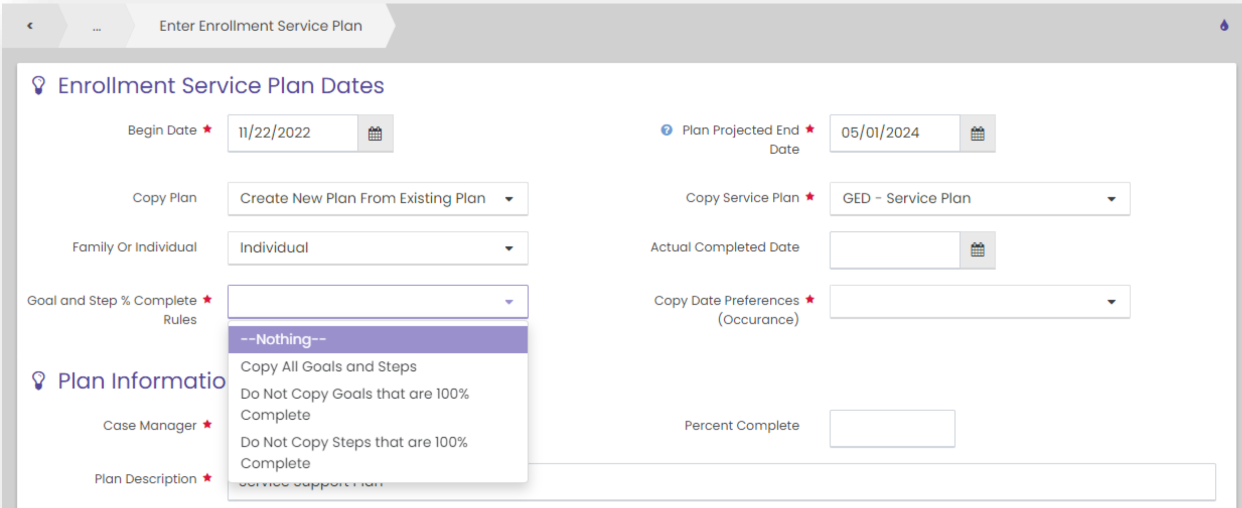
Details for the goals and steps can be edited as necessary.

Create New Plan from Existing Plan

The third method allows you to create a new Service Plan based off a copy of an existing plan. This method is especially helpful when Service Plans have a hard end date. This method allows for accomplished goals and/or steps to be removed and other tweaks to be performed without having to start from scratch.



Again, click ADD NEW.

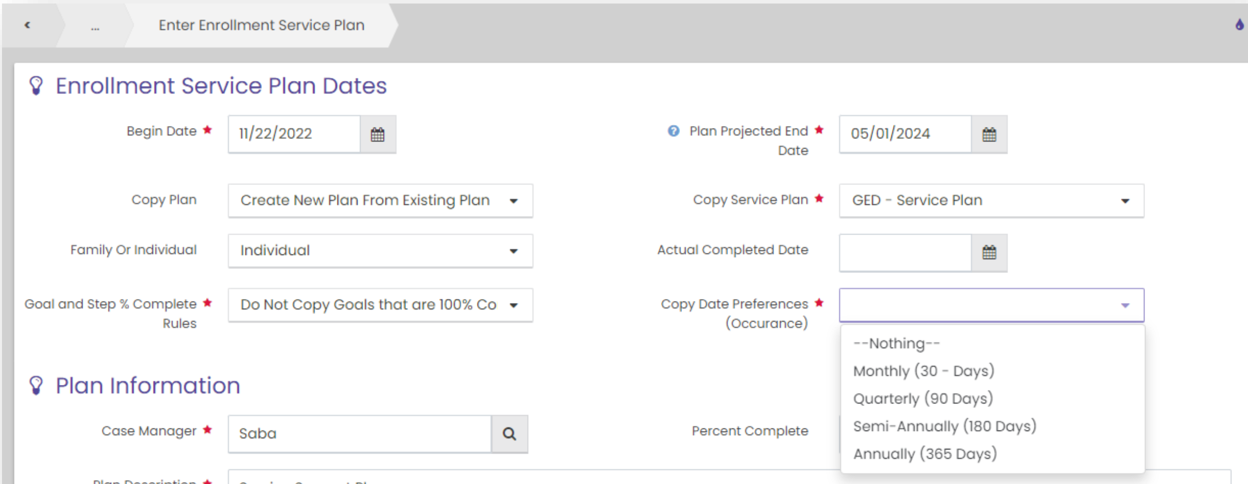


In **Copy Plan** select 'Create New Plan From Existing Plan'.

Copy Service Plan will display the Client's existing plans from which a copy will be made to create a new plan.

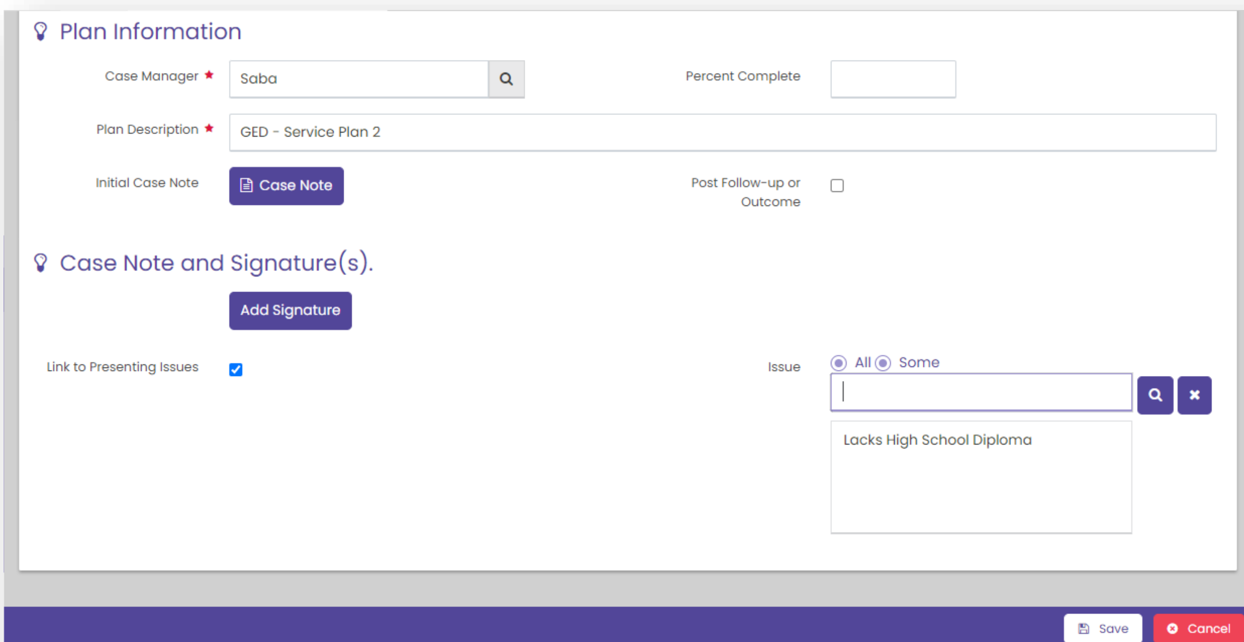
Goal and **Step % Complete Rules** allows you to further identify what information should be copied from the selected Service Plan.

- 'Copy All Goals and Step's copies all goals and steps from the selected Service Plan regardless of Client's progress.
- 'Do Not Copy Goals that are 100% Complete' copies everything except goals that are noted as being 100% complete.
- 'Do Not Copy Steps that are 100% Complete' copies everything except steps that are noted as 100% complete.



Copy Date Preferences (Occurrence) is used to configure the target dates for both goals and goal steps in the new Service Plan.

For example, if 'Monthly' is selected, the target date for both goals and steps will be 30 days from today. This does not change the Service Plan's projected end date.

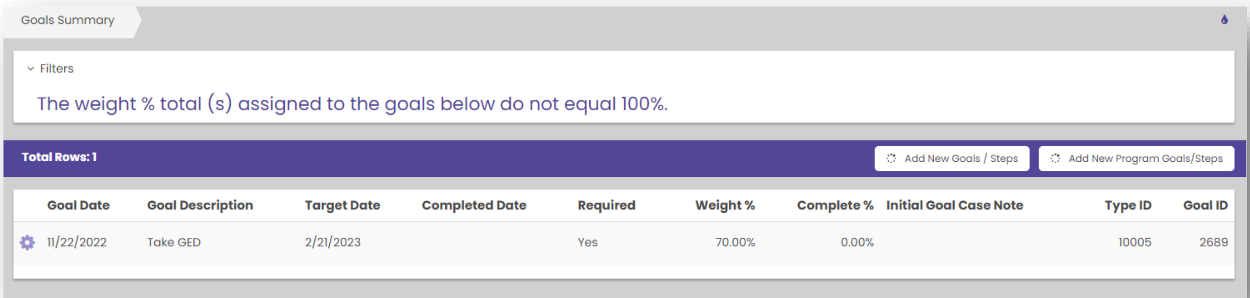


The rest of the plan's details are the same as previously discussed. You may need to update the **Plan Description** to distinguish this new one from the others on the *Enrollment Service Plan Summary* form.

Add case notes, follow-ups, outcomes, signatures and presenting issues as necessary.

SAVE the new Service Plan.

We can see that the new plan only has the one goal.



This concludes the *Preset Service Plans and Copying Existing Plans* video. The next video in the series details how to Manage Service Plans.

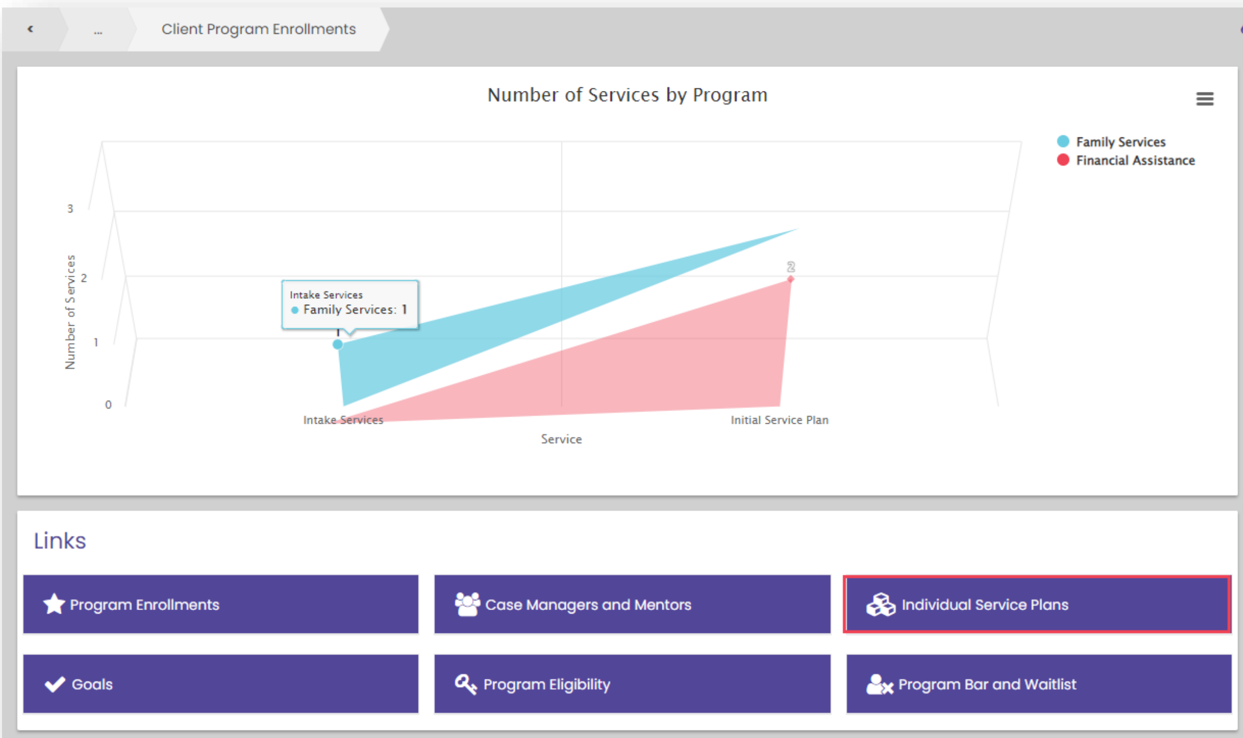
Managing Service Plans

This fifth video of the *Service Plans* video series details how to update and manage service plans after they are initially recorded.

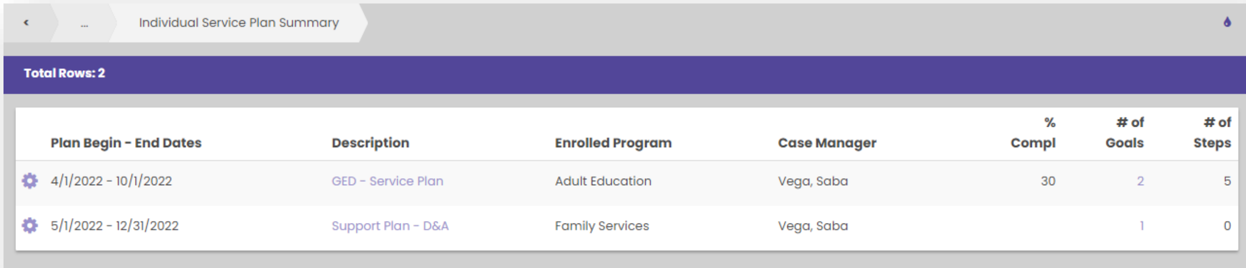
While the *Enrollment Service Plan Summary* form can be used for continual management, the *Client Program Enrollment* dashboard provides quicker access to update all of a Client's Service Plans.

Navigate on the Case Management tab, select Case Management, and then Program Enrollments.

The *Program Enrollment* dashboard includes the **Individual Service Plans** link.



This summary form displays Service Plans associated with all the Client's enrollments.



Individual Service Plan Summary

Total Rows: 2

	Plan Begin - End Dates	Description	Enrolled Program	Case Manager	% Compl	# of Goals	# of Steps
	4/1/2022 - 10/1/2022	GED - Service Plan	Adult Education	Vega, Saba	30	2	5
	5/1/2022 - 12/31/2022	Support Plan - D&A	Family Services	Vega, Saba		1	0

The plan's **Begin and End Dates** display.

Each plan's **Description** links to the *Edit Service Plan* form where updates can be made.

The associated **Program** and primary **Case Manager** also show.

The Service Plan's **Percentage Complete** displays along with the **Number of Goal(s)** and total **Number of Goal Steps**. The number of goals provides a quick link.

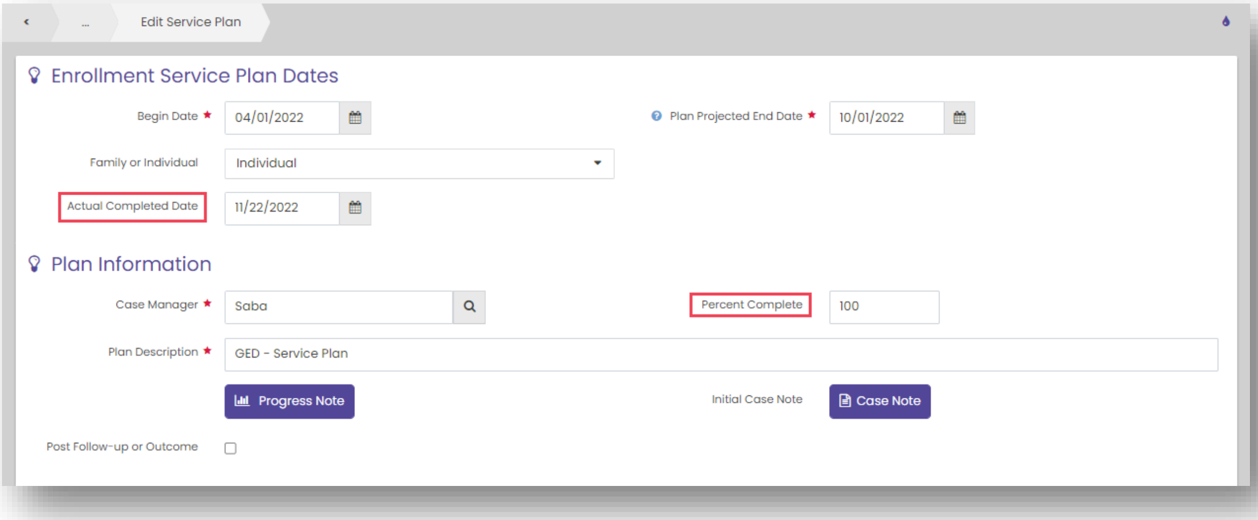
Service Plan Action Gear

The Service Plan action gear provides additional functionality for managing different aspects of the plan.

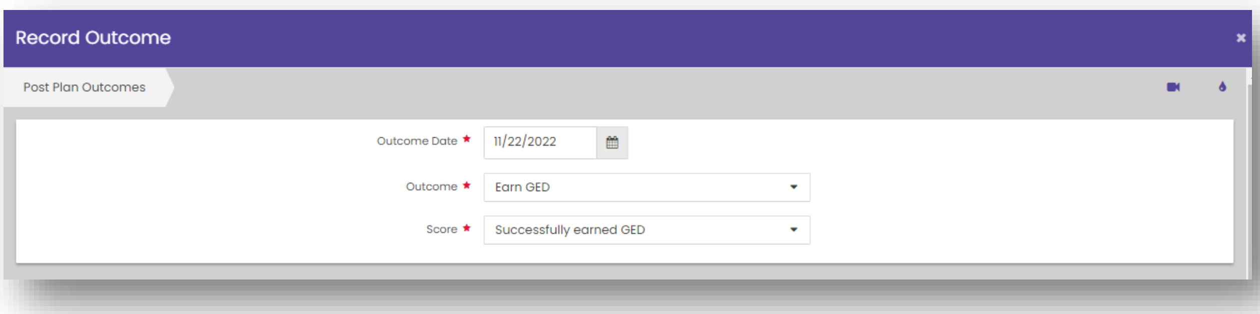
Edit

Use **Edit** to view and update the plan, which can also be accessed from the description.

The **Actual Completion Date** and **Percent Complete** need to both be entered to correctly note completion of the plan.

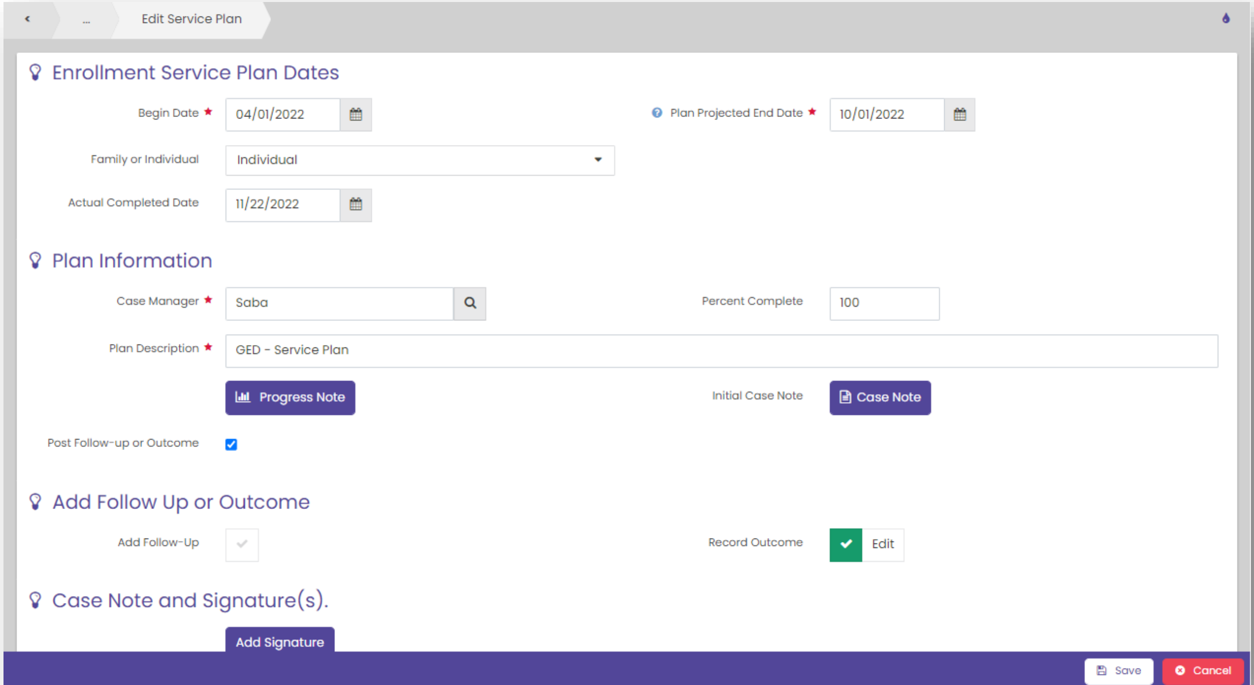


Recording **Outcomes** helps in the tracking of milestones for the Client's overall progress during their enrollment.



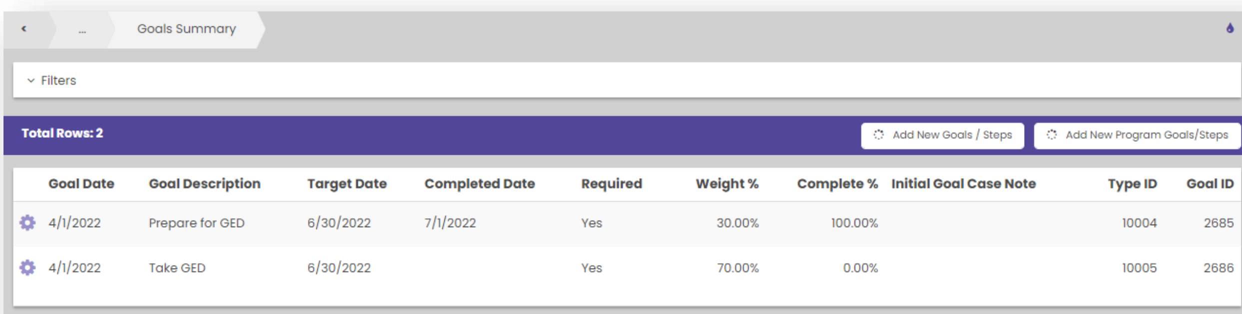
Outcomes which were mapped to the program are available for selection. Select an **Outcome** for the plan and a **Score**.

SAVE the updated Service Plan.



Goals and Steps

Goals and Steps shows a summary of goals associated with the Service Plan along with details for each.



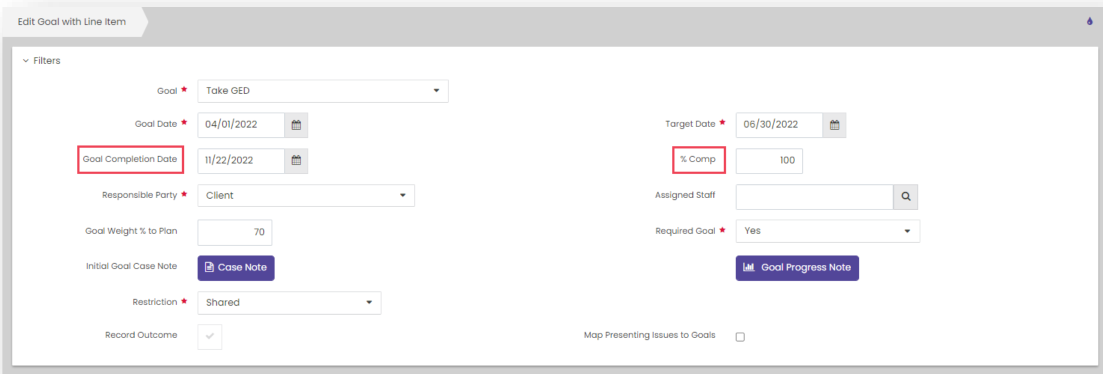
If this plan was still in progress, new goals could be added and existing goals can be edited here. Use ADD NEW PROGRAM GOALS/STEPS to add program specific goals, and use ADD NEW GOALS/STEPS to add any goal.

Goal Action Gear

Each goal's action gear provides the ability to edit the details of the goal and its steps, including noting progress. Updating the status of individual goals is optional. Some agencies choose to only update the Service Plan.

Edit Goals and Steps

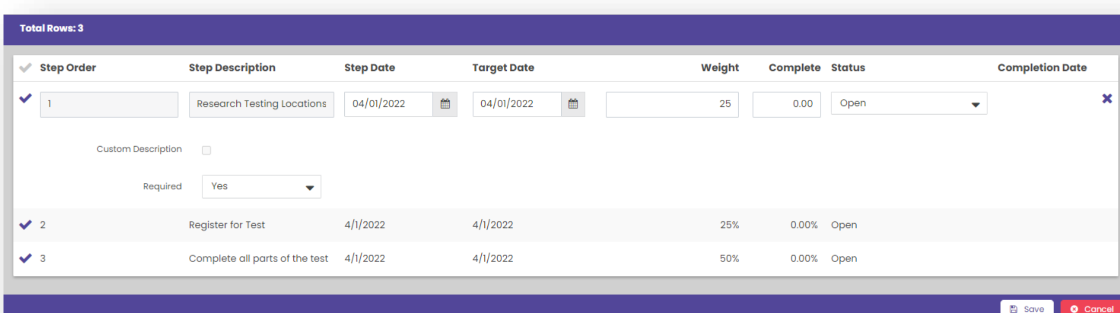
I'm going to update this goal's status and record an outcome.



Like with the Service Plan, enter a **Goal Completion Date** and **Percentage Complete (% Comp.)**.

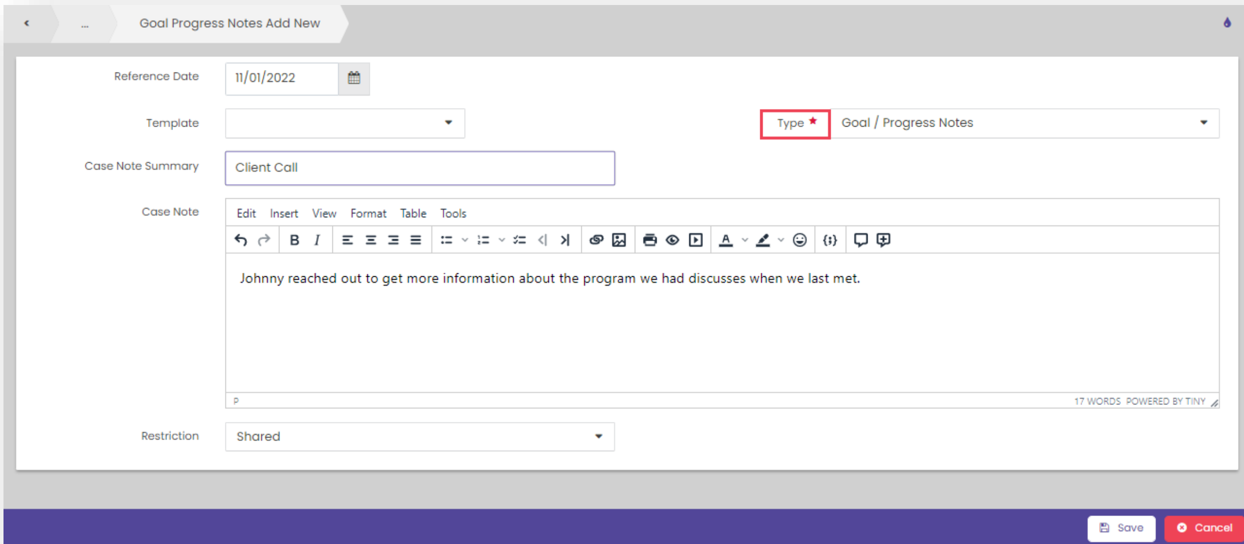
GOAL PROGRESS NOTES can also be recorded as well as outcomes. Again, some prefer to only enter these for the Service Plan.

Again, while not necessary, it is possible to update the status of each step. SAVE the updates when done.



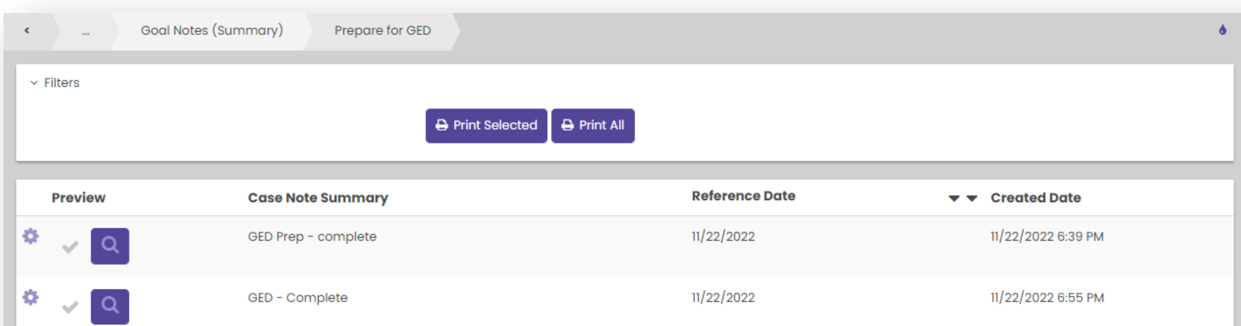
Add New Progress Note

Add New Progress Note allows a Case Note with the type 'Goal/Progress Notes' to be added for the goal.



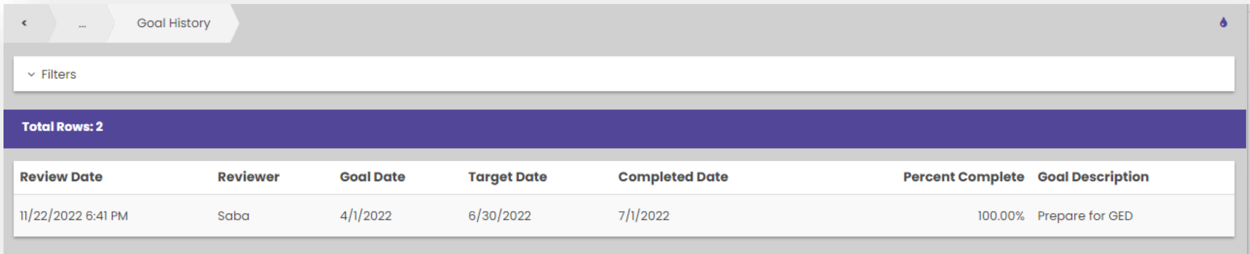
Goal Case Notes Summary

Goal Case Notes Summary displays case notes and progress notes which have been recorded for the goal. Notes can be viewed and printed.



Goal History

Goal History displays a detailed record for each time information about the Goal was changed.



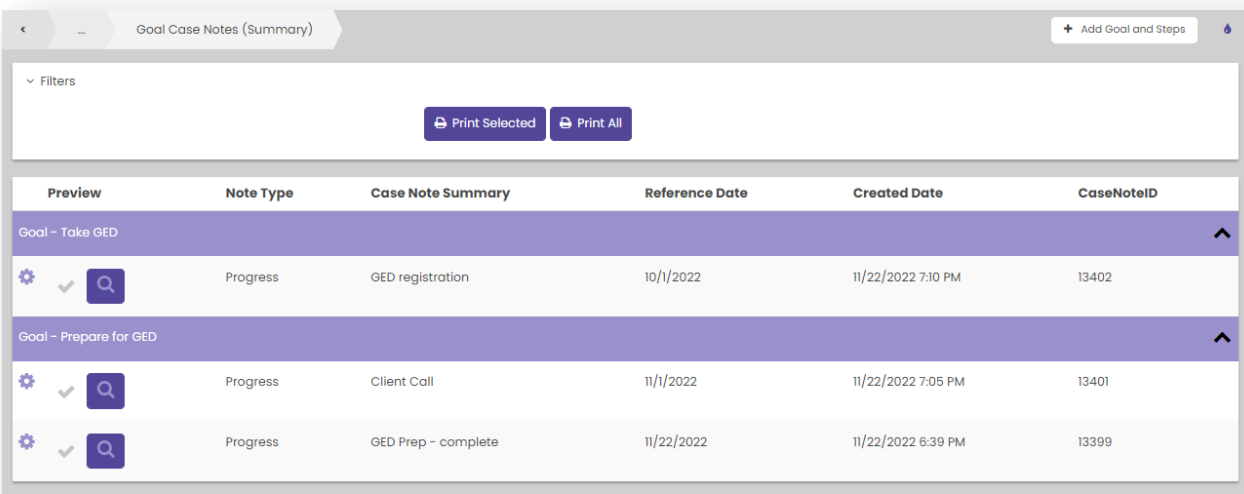
Delete

Finally, **Delete** can be used to permanently remove the goal from the Service Plan.

Let's return to the *Individual Service Plan Summary* form.

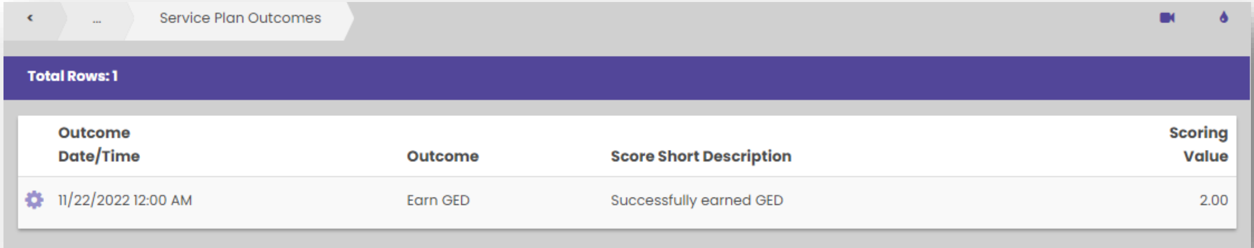
View Notes

View Notes displays all case notes and progress notes related to each goal within the selected Service Plan. Notes can be viewed and printed.



Outcomes

Scores for **Outcomes** recorded for the Service Plan appear here.



Service Plan Outcomes

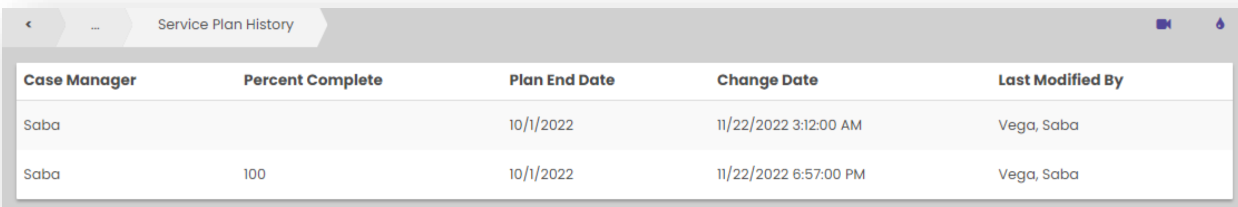
Total Rows: 1

Outcome Date/Time	Outcome	Score Short Description	Scoring Value
11/22/2022 12:00 AM	Earn GED	Successfully earned GED	2.00

TIP: Outcomes recorded for service plans and for goals are available for management on the *Client's Outcomes Summary* form. (Case Management tab: Case Management > Outcome Summary)

Plan History

Plan History shows the record of **Percentage Complete** updates for the Service Plan.



Service Plan History

Case Manager	Percent Complete	Plan End Date	Change Date	Last Modified By
Saba		10/1/2022	11/22/2022 3:12:00 AM	Vega, Saba
Saba	100	10/1/2022	11/22/2022 6:57:00 PM	Vega, Saba

Service Plan Report

Service Plan Report links to the launch form where parameters are set to run a detailed report pertaining to the Client's Service Plan. See the *Service Plan Report* video in this series for full details.

Treatment Plan Report

The **Treatment Plan Report** option generates the *Adult Treatment Plan* report.

Adult Treatment Plan

CaseWorthy

Run by Saba - Alliance for Community Trust on 11/22/2022 at 12:12 PM

Enrollment Service Plan ID: 2029

Treatment Plan Summary

Location

Provider Name:	Mountain Heights				
Address 1:	258 East North Ogden Canyon Road				
Address 2:					
City:	OGDEN	State:	UT	Zip Code:	84201
Phone Number:		Fax Number:			

Client/Case Information

Name:	Berline, Johnny	Gender:	Male
SSN:	549-74-6444	Date of Birth:	8/15/1994
Client ID:	24461		
Enrollment ID:	25594	Enrollment Date:	4/1/2022
Program:	Adult Education		

Plan Outline

Goal	Time Frame	Objective	Interventions

Problem List

- Lacks High School Diploma

Detail

Diagnosis (DSM-V)

Diagnosis	Designation	Effective Date

Signatures

Johnny Berline - Client 11/22/2022

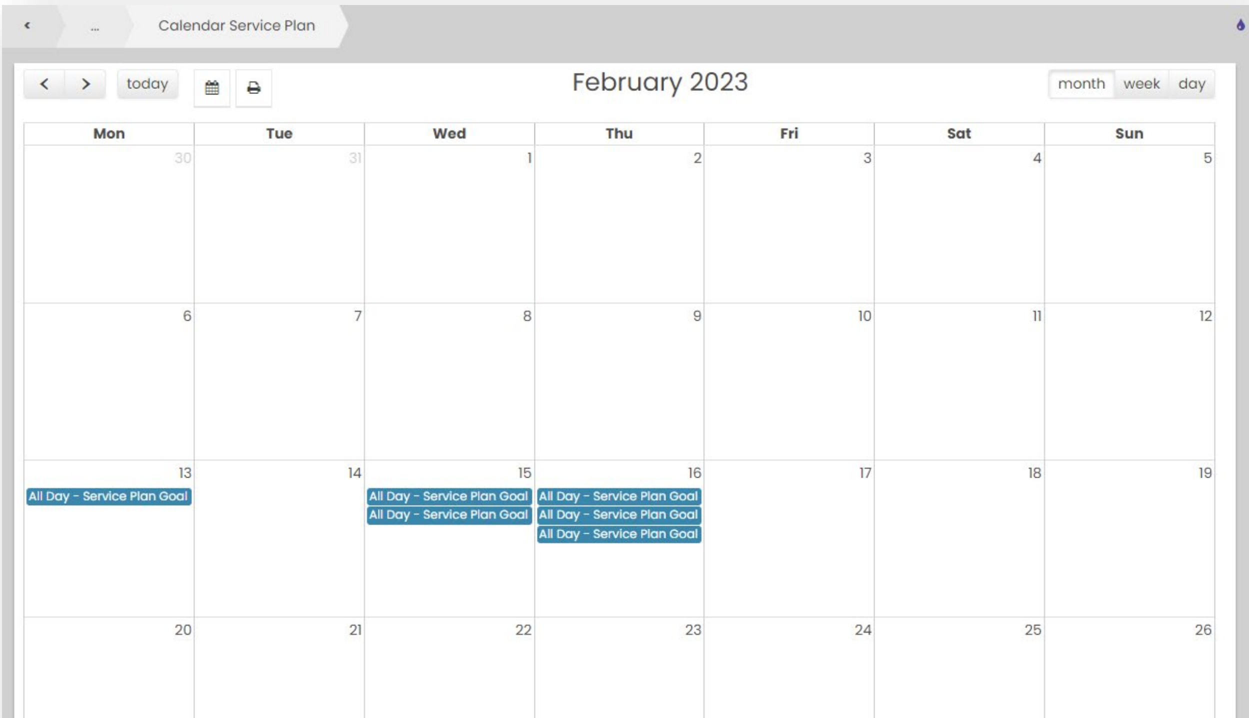
Saba Vega - Case Manager 11/22/2022

Delete

Delete removes the Service Plan and all of its associated goals and goal steps. Related case notes or outcomes recorded for the plan are retained and will need to be deleted separately.

Service Plan Calendar

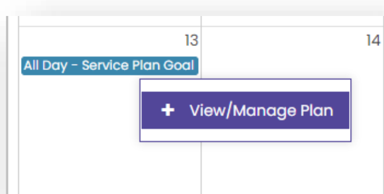
The Service Plan Calendar is a helpful tool for Case Managers to view their Client's Service Plan due dates and easily access the plans for management.

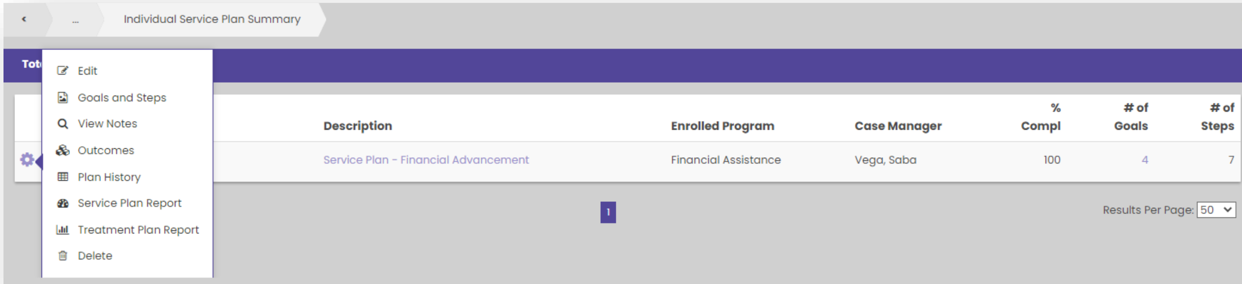


The calendar displays all Service Plans for which the User is the assigned Case Manager.

The calendar includes events for each Service Plan, goal, and goal step's due date.

Each event provides a link to a summary form where the details of the individual Service Plan can be managed and updated as needed.





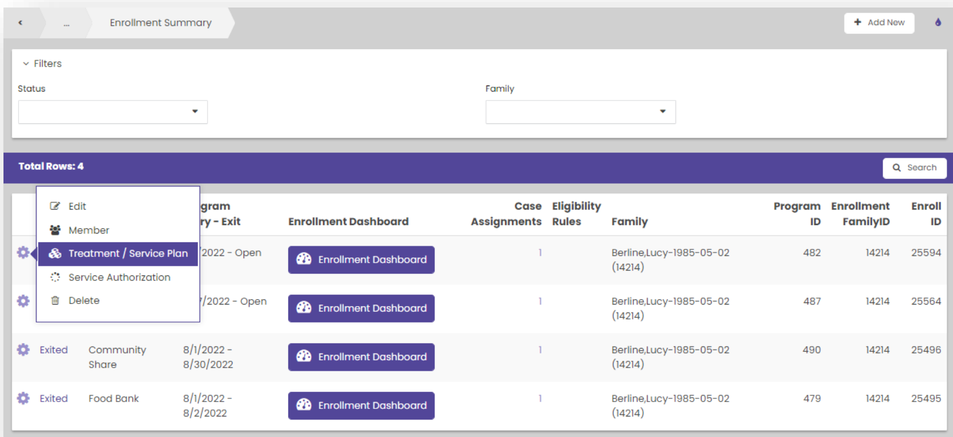
This concludes the *Managing Service Plans* video. The next video explores the *Service Plan Report*.

Service Plan Report

This sixth and final video of the *Service Plan* video series explores the *Service Plan Report*.

The *Service Plan Report* includes details about the active Client's Service Plan and is accessible from the action gear of the Service Plan.

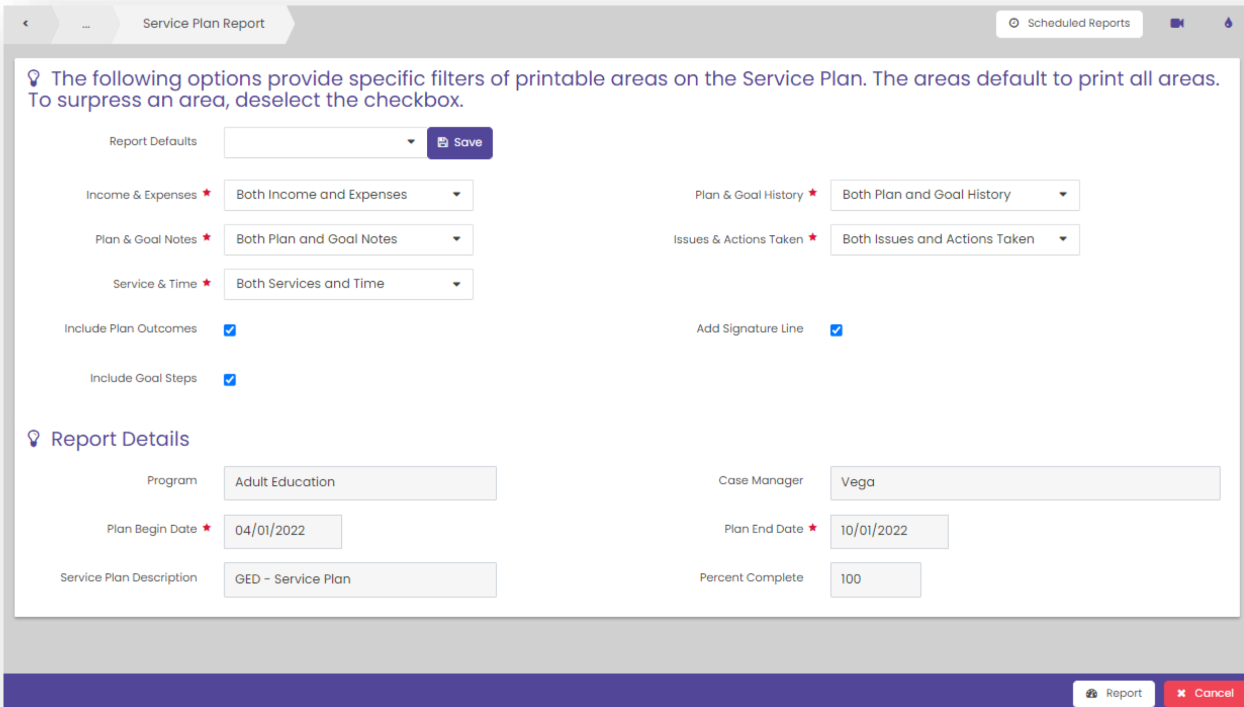
Let us navigate to a Service Plan for the active Client. Navigate on the Case Management tab, select Case Management, Program Enrollments, Program Enrollments, and then select **Treatment/Service Plans**.



From the action gear, select **Service Plan Report.**

Set Report Parameters

This report allows you to set multiple parameters to suit the needs of your business processes. To learn more about SSRS report capabilities including how to schedule reports, see the *SSRS Reports Basics* video.



Configuring these parameters allows you to select what service plan related details will be included in the generated report.

As I describe each parameter, I will share the corresponding section of the report.

Income & Expenses

Data which is collected on the *Income and Expenses Assessment* can be included. Options include 'None', meaning to not include any assessment data, 'Income Only', 'Expenses Only', or 'Both Income and Expenses'.

Family Budget			
Income Sources			
Salary		1,500.00	
	Total Income		$1,500.00
Expenses			
Other Expenses		1,200.00	
	Total Expenses		$1,200.00
Budget Excess or Deficit			$300.00

Plan & Goal History

Plan & Goal History determines what information should be included in the Service Plan Overview section of the report. Options include 'None', the 'Plan History Only', 'Goal History Only', or you can include 'Both Plan and Goal History' details.

Service Plan Overview

Plan Description	% Complete	Begin Date	Target Date	Actual Completion	Plan Type	Case Manager
GED - Service Plan	100.00	04/01/22	10/01/22	11/22/22		Vega, Saba
Saba Vega 11/22/22			10/1/22			Vega, Saba

Plan Goals and Status Overview

Plan Goal	Begin Date	Target Completion	Actual Completion	Goal Weighted % to Plan	% Complete
Prepare for GED	04/01/22	06/30/22	07/01/22	30.00	100.00
Saba Vega 11/22/22		6/30/22	7/1/22		100.00
Saba Vega 11/22/22		6/30/22	7/1/22		100.00
Take GED	04/01/22	06/30/22	11/22/22	70.00	100.00
Saba Vega 11/22/22		6/30/22	11/22/22		100.00
Saba Vega 11/22/22		6/30/22	11/22/22		100.00
Saba Vega 11/22/22		6/30/22	11/22/22		100.00

Plan Goals and Status Overview (cont'd)

Plan Goal	Required Goal	Responsible Party
Prepare for GED	Yes	Client
Saba Vega 11/22/22		
Take GED	Yes	Client
Saba Vega 11/22/22		

Plan & Goal Notes

Plan & Goal Notes displays case note details on the report. Select to include no case note details, 'Plan Notes Only', 'Goal Notes Only', or both.

Plan Case Notes	
Date	Notes
11/22/2022	He agrees to the terms and conditions of entering this service plan.
11/22/2022	Johnny successfully earned his GED and completed this service plan.

Goal Case Notes	
Prepare for GED	
Date	Notes
11/22/2022	Johnny completed all necessary to prepare for the GED.
11/22/2022	Johnny reached out to get more information about the program we had discusses when we last met.
Take GED	
Date	Notes
11/22/2022	Johnny explained he is scheduled to complete all parts of the GED later this month.

Issues & Actions Taken

Issues & Actions Taken displays presenting issues for the family that were entered during intake and appear on the Head of Household's record. The actions taken only display if the issue was associated to the selected Service Plan.

Presenting Issues Faced by Family	
Presenting Issue Description	Presenting Issue Category (ies)
Addiction	ADL - Continence, ADL - Dressing, Counseling
Anxiety Disorder	Counseling, Medical Conditions, Mental Health
Lacks High School Diploma	Education
Needs additional life skills	CC Phoenix

Presenting Issue Treatment Actions		
Family Member | Presenting Issue		Action Taken
Johnny Berline	Lacks High School Diploma	Created a tailored Service Plan, beginning on 2022-04-01

Service & Time

Service & Time displays services that are tied to the program enrollment. Client time appears if it was entered using a time post control on a case note. Choose to include no service and time details, 'Services Only', 'Time Only', or both.

Client Services				
Service Date	Service	Units	Rate	Amount
6/1/22	Education	1.0000	1.00	$1.00
9/1/22	Gift Card	1.0000	50.00	$50.00
11/21/22	Initial Service Plan	1.0000	1.00	$1.00

Include Plan Outcomes

Include Plan Outcomes displays outcomes recorded for the plan's goals.

Goal Outcomes			
Take GED			
Outcome Date	Outcome Domain	Short Description of Outcome	Score
11/22/2022	Earn GED	Successfully earned GED	2

Include Goal Steps

Include Goal Steps will list the goal steps for each of the plan's goals.

Steps Planned to Reach Each Goal

Prepare for GED

Step	Begin Date	Target Completion	Actual Completion	% Weight to Goal	Complete (%)	Required Step
Take GED Practice tests	11/22/22	11/22/22	07/01/22	50.00	100.00	Yes
Attend Classes	11/22/22	11/22/22	07/01/22	50.00	100.00	Yes

Take GED

Step	Begin Date	Target Completion	Actual Completion	% Weight to Goal	Complete (%)	Required Step
Research Testing Locations	04/01/22	04/01/22	11/22/22	25.00	100.00	Yes
Register for Test	04/01/22	04/01/22	11/22/22	25.00	100.00	Yes
Complete all parts of the test	04/01/22	04/01/22	11/22/22	50.00	100.00	Yes

Steps Planned to Reach Each Goal (cont'd)

Prepare for GED

Step	Responsible Party	Goal Step Status
Take GED Practice tests		Completed
Attend Classes		Completed

Take GED

Step	Responsible Party	Goal Step Status
Research Testing Locations		Completed
Register for Test		Completed
Complete all parts of the test		Completed

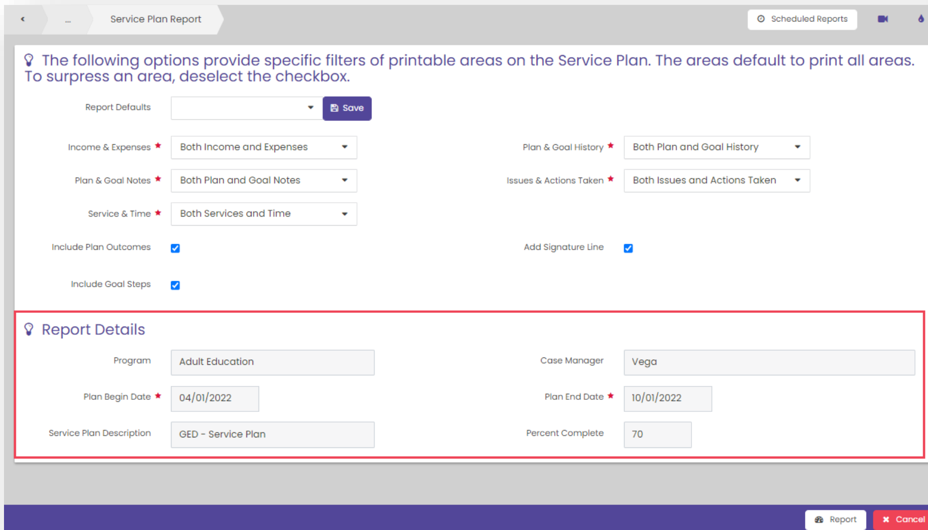
Add Signature Line

Add Signature Line displays a signature line for the Client, as well as an Agency Representative.

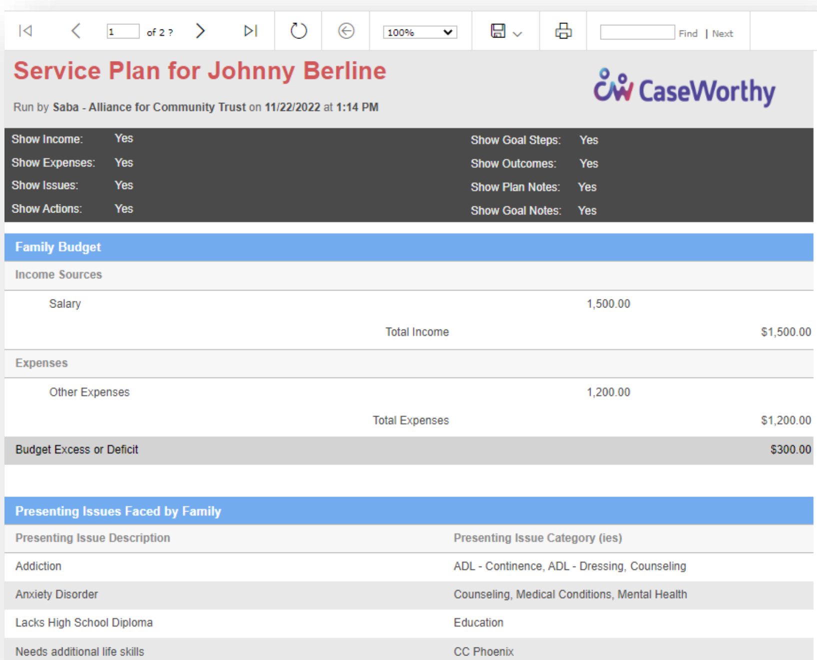
To remove these items from the report, simply deselect the option.

Report Details

The Report Details displays specifics of the service plan.



Click REPORT to generate it.



This concludes the *Service Plans* video series.