



SERVICE PLANS – VIDEO COMPANION GUIDE

CaseWorthy Training & Documentation

Contents

Video Companion Guide Overview	3
Overview	4
What is a Service Plan?	4
Methods to Record Service Plans	5
Use a Workflow to Create the Service Plan	5
Use a Preset Service Plan	5
Copy an Existing Service Plan	5
Create a Service Plan Manually	5
Initiating Service Plans	5
System Configuration for Service Plans	8
Service Plans	8
Create Goals	9
Create Goal Steps	10
Mapping	13
Goals to Goal Steps	13
Program to Service Plan	15
Program to Goal	18
Programs to Outcomes	20
Service Plan Workflow	21
Launch Service Plan Workflow	21
Service Plan (Input)	22
Add Service Plan Program Goal and Steps	24
Question – Add a Program Goal	28
Question – Add Any Goal	29
Question – Service Plan Report	30
Goal Plan Summary	31

Preset Service Plans and Copying Existing Plans	33
Enter Plan Manually	34
Entering Preset Service Plans	34
Create New Plan from Existing Plan	37
Managing Service Plans	41
Service Plan Action Gear	42
Edit	42
Goals and Steps	44
View Notes	47
Outcomes	47
Plan History	48
Service Plan Report	48
Treatment Plan Report	49
Delete	49
Service Plan Calendar	50
Service Plan Report	52
Set Report Parameters	53
Income & Expenses	54
Plan & Goal History	54
Plan & Goal Notes	55
Issues & Actions Taken	55
Service & Time	56
Include Plan Outcomes	56
Include Goal Steps	57
Add Signature Line	57
Report Details	58

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

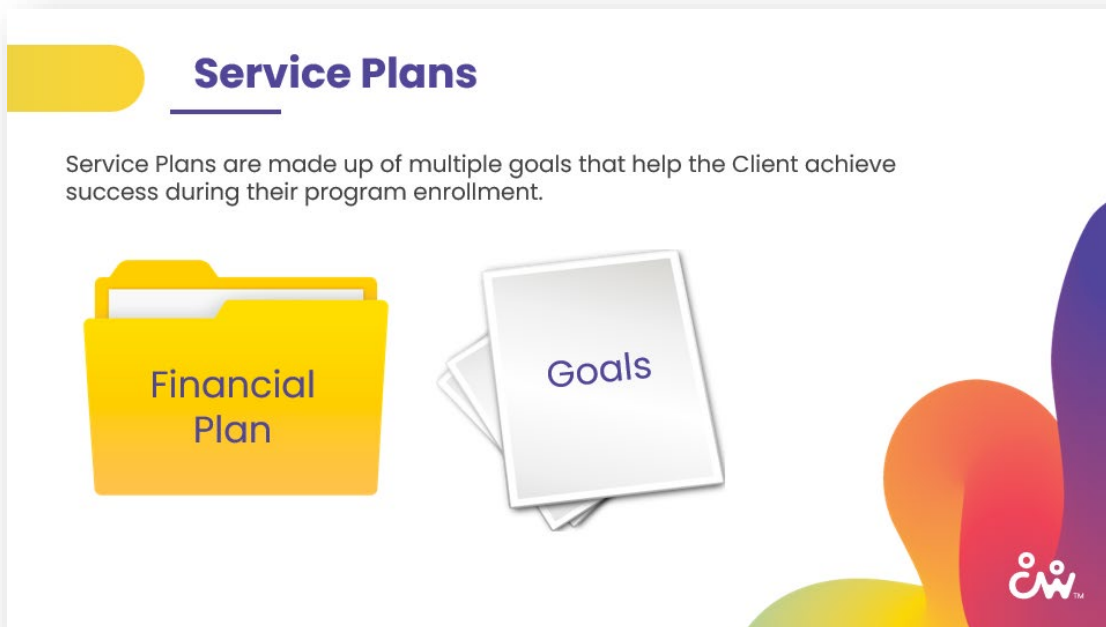
The *Service Plans* video series includes information about the following topics:

- 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 an 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

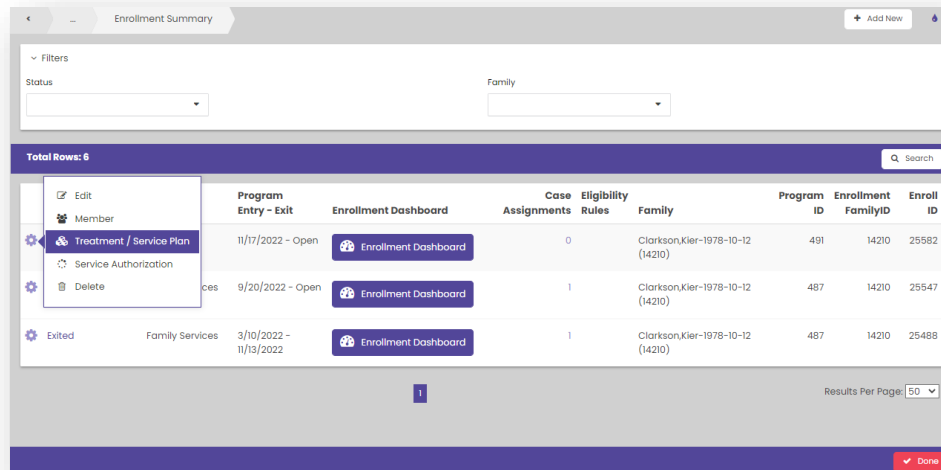
Finally, the ability to create a Service Plan and then associate the goals and goals steps manually is also available.

Initiating Service Plans

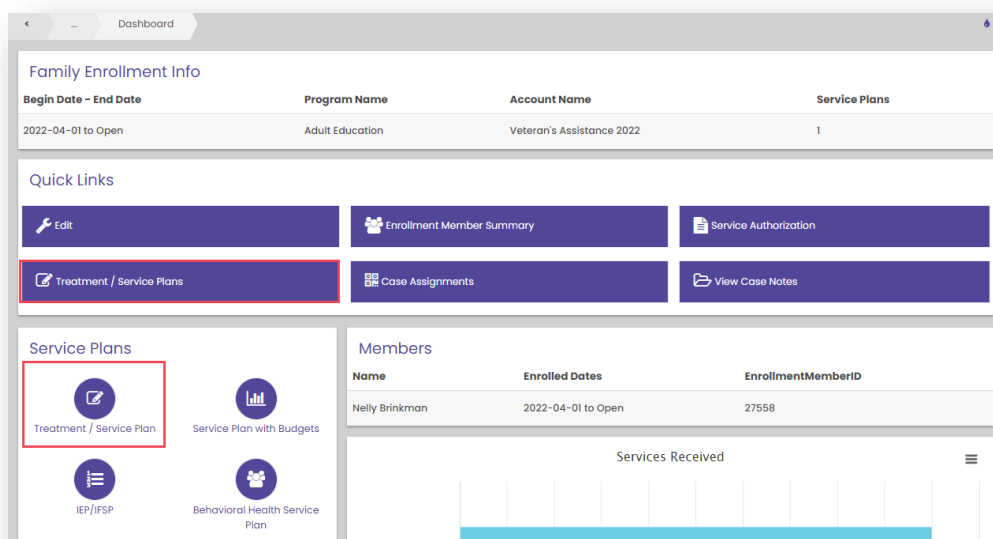
Service Plans are intended to assist Clients achieve goals while they are enrolled in programs, therefore they are associated with the Client's enrollment.

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.

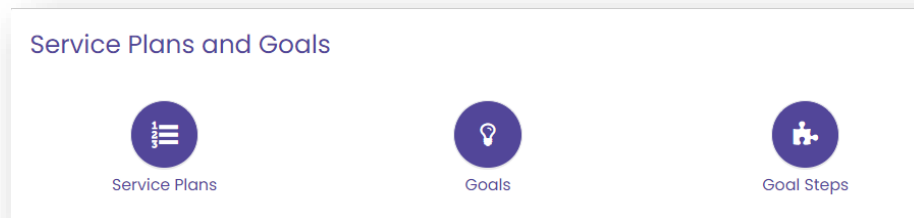


This concludes the *Service Plans Overview* video. In the next video, we will review the System Configuration that is necessary for Service Plan functionality.

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.

A screenshot of a web application interface for configuring "Plan Types". At the top, there's a header bar with "Plan Types" and buttons for "Manage Categories" and "Add Row". Below the header is a "Filters" section with a "Description" search box and a "Category" dropdown menu. A table below shows a list of plan types. The table has three columns: "Description", "Category", and "Organizations". There are three rows of data, each with a checkmark in the first column. The table is titled "Total Rows: 3" and has a search bar on the right.

Description *	Category *	Organizations *
✓ Job Advancement	Some	Some
✓ Earn GED	Some	Some
✓ Education Service Plan	Some	All

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)

Description * **Category *** **Organizations ***

✓ Financial Plan Choose Options... Financial

All None Choose Options... A Place for Change Alliance for Community Trust

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**.

Goals

Manage Categories Add Row

Filters

Goal Category

Total Rows: 64

Goal Description *	Goal Category	Goal ID	Organizations
✓ Ability to follow rules and instructions.	HS Health Status and Practices	63	All
✓ Ability to give and take in situations. (Sharing)	HS Cooperation	72	All
✓ Acquire GED	Education	51	All
✓ Acquire needed docs	Legal	50	All
✓ Children have safe, adequate sleeping arrangements	Family Support	86	All
✓ Chip Benefits	Entitlements	46	All

Save Cancel

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.

The screenshot shows a web interface for managing goals. At the top, there are four columns: 'Goal Description *', 'Goal Category', 'Goal ID', and 'Organizations'. Below these columns is a form to add a new goal. The 'Goal Description' field contains 'Save \$500'. The 'Goal Category' dropdown is set to 'Financial'. The 'Goal ID' field is empty. The 'Organizations' dropdown is set to 'All'. Below the form is a table of existing goals.

Goal Description *	Goal Category	Goal ID	Organizations
✓ Save \$500	Financial		All
✓ Establish Checking and Savings Accounts	Financial	48	All
✓ Financial Education	Financial	52	All

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.

Goal Steps

+

Add Row

Filters

Goal Step Description

Total Rows: 90

Q

Search

Step Description *	Sort Order	Goal Step ID
✓ 30 days clean		22
✓ Absences		103
✓ Add fractions		30
✓ ADL		54
✓ After School Math Study Program		96
✓ Arrange Tutor		18
✓ Assess job preferences		76
✓ Assess job skills		74
✓ Attend 3 Financial Classes	1	121
✓ Attend AA class		21
✓ Attend Group Therapy		91

Save

Cancel

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.

Step Description *

Sort Order

Goal Step ID

✓

Save \$50

1

✕

Target Validation Type

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.

Step Description *	Sort Order	Goal Step ID
✓ Save \$400 Target Validation Type <input type="text"/>	3	<input type="text"/>
✓ Save \$250 Target Validation Type <input type="text"/>	2	<input type="text"/>
✓ Save \$50 Target Validation Type <input type="text"/>	1	<input type="text"/>

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.

Goal Steps

+ Add Row

Filters

Goal Step Description

Total Rows: 5

Search

Step Description *	Sort Order	Goal Step ID
✓ Other1		43
✓ Other2		44
✓ Other3		45
✓ Other4		46
✓ Other5		47

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.

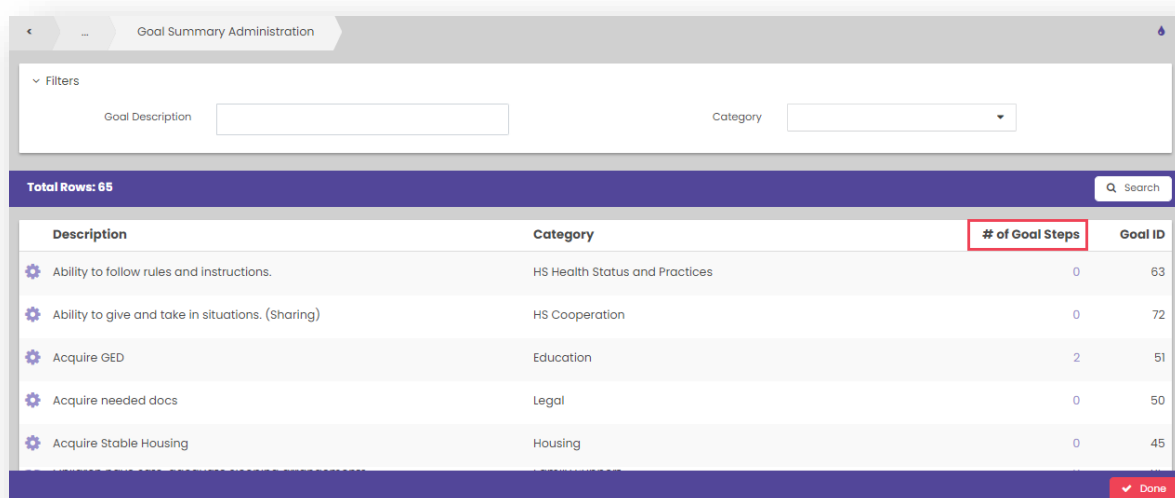
Program mapping is necessary for different reasons.

- 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

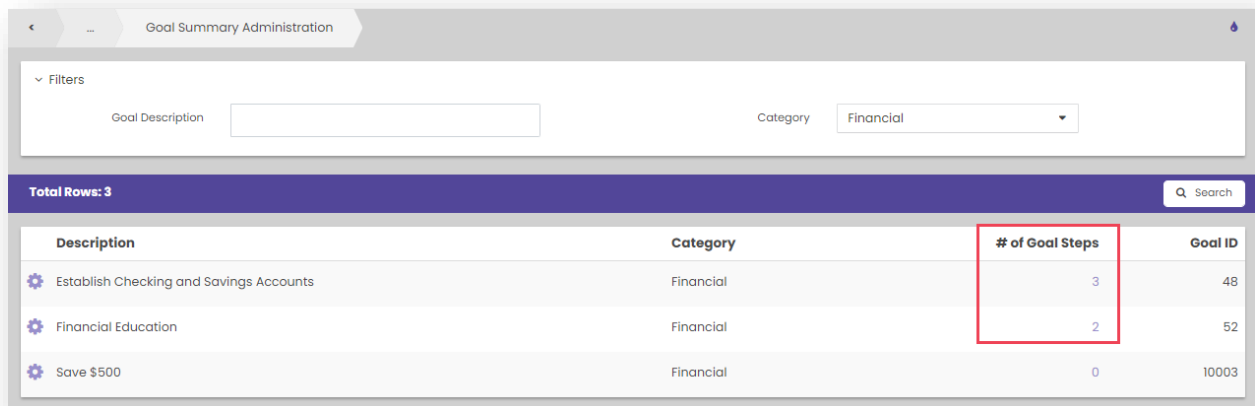
While your database initially does have goal and goal steps, the mapping of goals to goal steps must be performed by a System Administrator. This is necessary for all service plan entry modes. Once done, the number of mapped goal steps is reflected here.



The screenshot shows the 'Goal Summary Administration' interface. At the top, there are filters for 'Goal Description' (a text input) and 'Category' (a dropdown menu). Below the filters, a table lists goals with columns for 'Description', 'Category', '# of Goal Steps' (highlighted with a red box), and 'Goal ID'. The table shows 5 rows of data. At the bottom right of the table, there is a 'Done' button with a checkmark icon.

Description	Category	# of Goal Steps	Goal ID
Ability to follow rules and instructions.	HS Health Status and Practices	0	63
Ability to give and take in situations. (Sharing)	HS Cooperation	0	72
Acquire GED	Education	2	51
Acquire needed docs	Legal	0	50
Acquire Stable Housing	Housing	0	45

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



Goal Summary Administration

Filters

Goal Description

Category

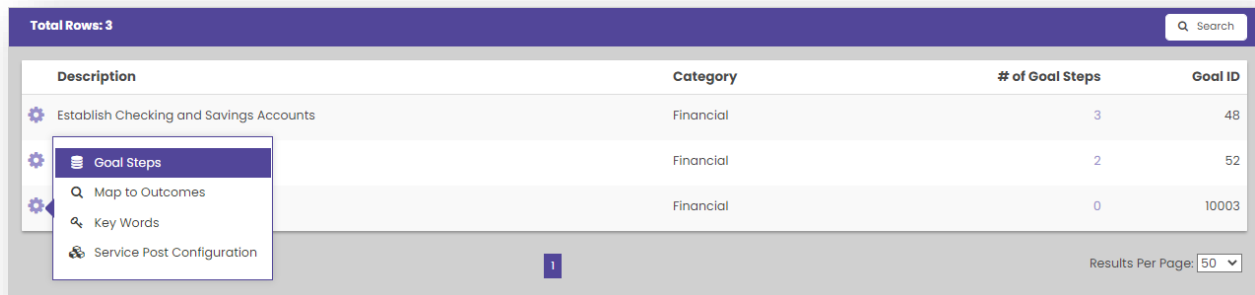
Total Rows: 3

Search

Description	Category	# of Goal Steps	Goal ID
Establish Checking and Savings Accounts	Financial	3	48
Financial Education	Financial	2	52
Save \$500	Financial	0	10003

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**.



Total Rows: 3

Search

Description	Category	# of Goal Steps	Goal ID
Establish Checking and Savings Accounts	Financial	3	48
Financial Education	Financial	2	52
Save \$500	Financial	0	10003

Goal Steps

Map to Outcomes

Key Words

Service Post Configuration

1

Results Per Page: 50

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**.

The screenshot shows the 'Program Summary' interface. At the top, there's a 'Filters' section with a 'Program Name' search box. Below this, a purple header bar indicates 'Total Rows: 16' and includes a search icon. The main table has three columns: 'Program Name', 'Program Begin - End Dates', and 'Program ID'. A dropdown menu is open from the gear icon of the 'Energy Assistance' row, showing options: 'Suggest Plans', 'Suggest Goals', 'Suggest Classes', 'Program Questions', 'Outcomes', and 'Curriculum'. The 'Done' button is at the bottom right.

Program Name	Program Begin - End Dates	Program ID
Adult Education	12/30/2022 - Open	482
APFC - HMIS	1/1/2020 - Open	494
Community Outreach	1/1/2020 - Open	496
Community Share	1/1/2022 - Open	490
Emergency Shelter	9/1/2021 - Open	480
Employment Assistance Program	12/1/2021 - Open	484
Energy Assistance	1/1/2021 - Open	489
Energy Assistance	1/1/2023 - 12/31/2023	493
	1/1/2022 - Open	487
	1/1/2022 - Open	491
	3/1/2019 - Open	479
	12/1/2021 - Open	485
House of Ruth	5/1/2021 - Open	481

Service Plan

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

The screenshot shows the 'Suggest Program Plan' form. It has a 'Filters' section with three input fields: 'Plan Types' (set to 'Financial Plan'), 'Plan Target Due Days' (set to '240'), and 'Percent Complete Method' (set to 'Calculate from 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.

Goal Description	Restriction	Weight %	Suggest ID
<input checked="" type="checkbox"/> Save \$500	Shared	20	81
<small>Responsibility</small> <input type="text" value="Client"/>	<small>Target Days</small> <input type="text" value="240"/>	<small>Required</small> <input type="text" value="Yes"/>	
<input checked="" type="checkbox"/> Establish Checking and Si	Shared	40	80
<small>Responsibility</small> <input type="text" value="Client"/>	<small>Target Days</small> <input type="text" value="90"/>	<small>Required</small> <input type="text" value="Yes"/>	
<input checked="" type="checkbox"/> Financial Education	Shared	40	79
<small>Responsibility</small> <input type="text" value="Client"/>	<small>Target Days</small> <input type="text" value="120"/>	<small>Required</small> <input type="text" value="Yes"/>	

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.

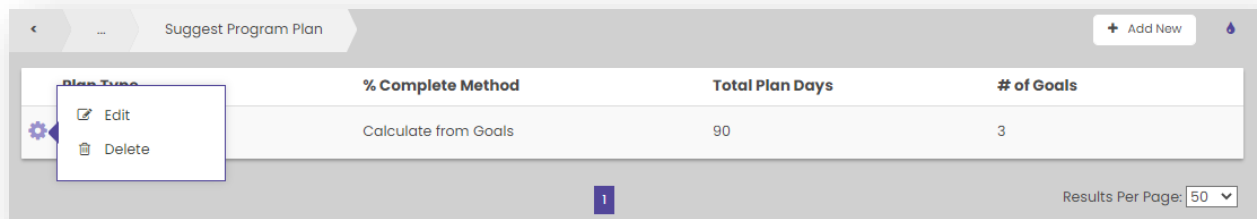
The **Weight %** field indicates the weight that the goal holds within the Service Plan. The sum for all Goals Weight % are required to equal 100%.

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.



Plan Type	% Complete Method	Total Plan Days	# of Goals
Calculate from Goals	90	3	

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**.

		Suggest Plans	1/1/2023 - 12/31/2023	493
		Suggest Goals	1/1/2022 - Open	487
		Suggest Classes	1/1/2022 - Open	491
		Program Questions		
		Outcomes	3/1/2019 - Open	479
		Curriculum	12/1/2021 - Open	485

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

Program Goal			
Total Rows: 65			
Q Search			
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		
Save Cancel			

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

Program Goal			
✓ Other	Education	Shared	85
Responsibility	Client	Target Days	Weight
			Required

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.

Program Outcome Setup

Filters

Domain Name

Category Choose Options...

Financial

Total Rows: 5 Search

Domain Name	Sort Order	Domain ID
Financial		
<input checked="" type="checkbox"/> Do you have checking and savings accounts?	<input type="text"/>	1000000010
<input checked="" type="checkbox"/> Financial Basics Completed	<input type="text"/>	1000000011
<input checked="" type="checkbox"/> 1h - Increases (Salary, Benefits, Hours)		320
<input checked="" type="checkbox"/> 3c-d - Savings Account		329

1 Results Per Page: 50

Save Cancel

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

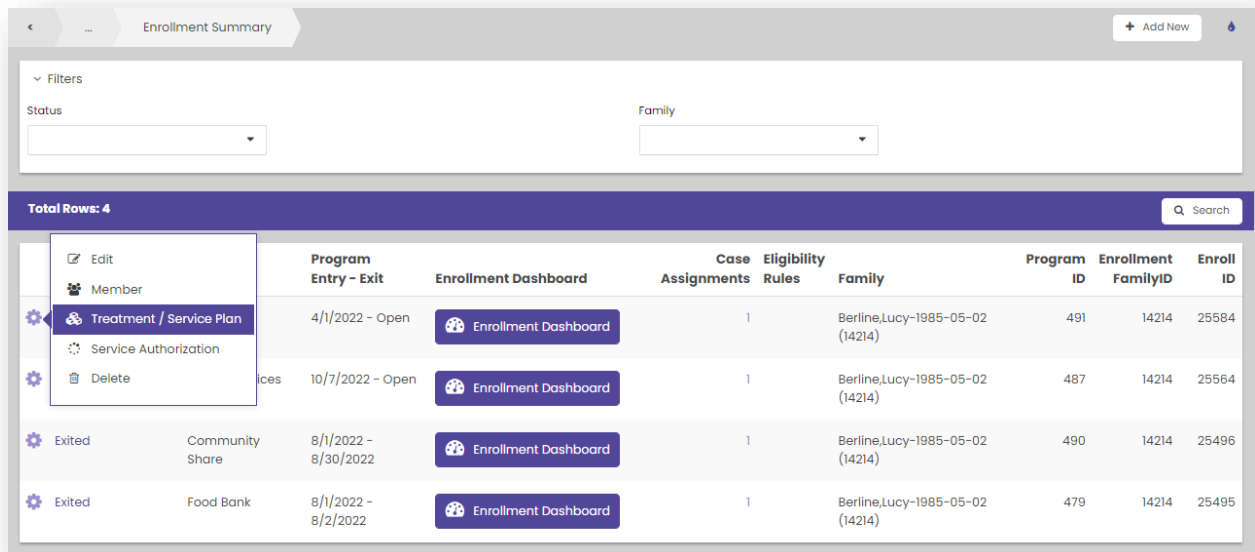
This concludes the *System Configuration for Service Plans* video. In the next video, we will explore using the Service Plan Workflow in Case Management.

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.



The screenshot shows the 'Enrollment Summary' page. At the top, there are filters for 'Status' and 'Family'. Below the filters, a table lists enrollment records. A context menu is open for the first row, showing options: 'Edit', 'Member', 'Treatment / Service Plan' (highlighted), 'Service Authorization', and 'Delete'. The table has columns for Program Entry - Exit, Enrollment Dashboard, Case Assignments, Eligibility Rules, Family, Program ID, Enrollment FamilyID, and Enroll ID.

Program Entry - Exit	Enrollment Dashboard	Case Assignments	Eligibility Rules	Family	Program ID	Enrollment FamilyID	Enroll ID
4/1/2022 - Open	Enrollment Dashboard	1		Berline,Lucy-1985-05-02 (14214)	491	14214	25584
10/7/2022 - Open	Enrollment Dashboard	1		Berline,Lucy-1985-05-02 (14214)	487	14214	25564
8/1/2022 - 8/30/2022	Enrollment Dashboard	1		Berline,Lucy-1985-05-02 (14214)	490	14214	25496
8/1/2022 - 8/2/2022	Enrollment Dashboard	1		Berline,Lucy-1985-05-02 (14214)	479	14214	25495

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*.



The screenshot shows the 'Enrollment Service Plan Summary' page. At the top, there are tabs for 'Enrollment Service Plan Summary' and 'Family Services'. Below the tabs, there are buttons for '+ Add New' and '+ Add New Workflow' (highlighted with a red box). The table below shows 'Total Rows: 0'.

Enrollment Service Plan Summary	Family Services
+ Add New + Add New 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.

Service Plan (Input)

Enrollment Service Plan Dates

Begin Date * 11/21/2022

Plan End Date * 07/21/2022

Actual Completed Date

Plan Information

Case Manager * Saba

Plan Type * Initial

Plan Description * Financial Improvement Plan

Percent Complete

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.

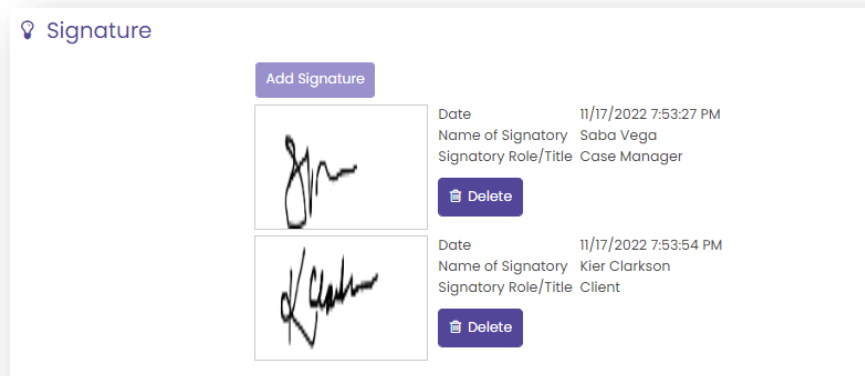
Next, add information about the plan. The **Case Manager** will default to the current User. Use the lookup to select a different Case Manager, if necessary.

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.

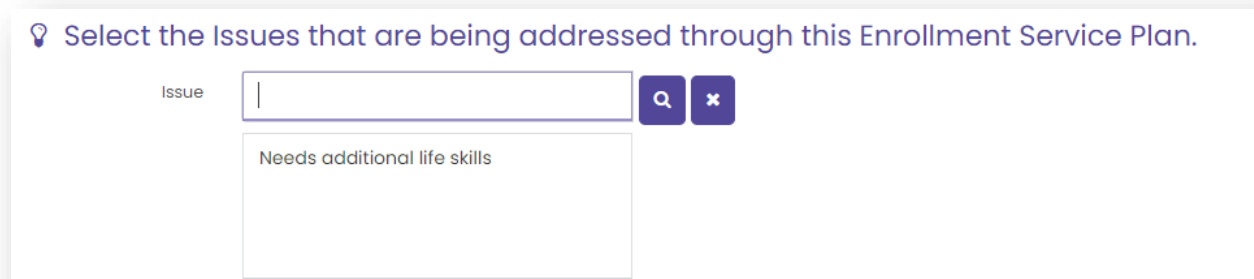
Signatures can be captured for the Client and the Case Manager.



The screenshot shows a section titled "Signature" with a lightbulb icon. It contains an "Add Signature" button. Below this, there are two signature entries. Each entry consists of a signature image and a set of metadata. The first entry shows a signature for Saba Vega, Case Manager, dated 11/17/2022 7:53:27 PM, with a "Delete" button. The second entry shows a signature for Kier Clarkson, Client, dated 11/17/2022 7:53:54 PM, also with a "Delete" button.

Signature	Date	Name of Signatory	Signatory Role/Title	Action
	11/17/2022 7:53:27 PM	Saba Vega	Case Manager	<button>Delete</button>
	11/17/2022 7:53:54 PM	Kier Clarkson	Client	<button>Delete</button>

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



The screenshot shows a section titled "Select the Issues that are being addressed through this Enrollment Service Plan." with a lightbulb icon. Below the title is a search bar labeled "Issue" with a magnifying glass icon and a close button. A dropdown menu is open, showing the text "Needs additional life skills".

Issue:

Needs additional life skills

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.

Schedule Followup

Client: Clarkson, Kier

Follow Up Type: Schedule Follow Up

Follow Up Days: 30

Follow Up Status: Open

Assigned Team: Case Managers

Target Follow Up Date: 12/17/2022

Team Member: Vega, Saba

Update **Cancel**

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.

Add Service Plan Program Goal and Steps

Filters

Goal: --Nothing--
Establish Checking and Savings Accounts
Financial Education
Other
Save \$500

Goal Date:

Goal Completion Date:

Responsible Party:

Case Note: **Case Note**

Target Date:

% Comp:

Assigned Staff:

Restriction: Shared

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 screenshot shows a web form titled "Add Service Plan Program Goal and Steps". It features a "Filters" section with the following fields: "Goal" (a dropdown menu with "Establish Checking and Savings" selected), "Goal Date" (a date field with "11/21/2022" and a calendar icon), "Goal Completion Date" (an empty date field with a calendar icon), "Responsible Party" (a dropdown menu with "Client" selected), "Case Note" (a button with a document icon and the text "Case Note"), "Target Date" (a date field with "02/20/2023" and a calendar icon), "% Comp" (an empty text field), "Assigned Staff" (a text field with "Mindy" and a search icon), and "Restriction" (a dropdown menu with "Shared" selected).

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.

Case Note (Add)

Reference Date * 11/21/2022

Template

Type Goal / Progress Notes

Summary * Goal

Voice To Text

Note Description

Paragraph Paragraph System Font 12pt

They have a list of banks they wish to research before opening an account.

Save Cancel

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.

Map Issues to Goal

Client Presenting Issues

Close Issue(s)

Record Follow Up

Add Follow-Up

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 screenshot shows a form for configuring goal steps. It has a table-like structure with columns: Step Order, Step Description, Step Date, Target Date, Status, and Completion Date. There are three steps listed, each with a checkmark in the Step Order column. Step 1: 'Research Banks', Step Date '11/21/2022', Weight % '40', Status 'Open', Required 'Yes'. Step 2: 'Set-up and Attend Meeting to c', Step Date '11/21/2022', Weight % '40', Status 'Open', Required 'Yes'. Step 3: 'Other1', Step Date '11/21/2022', Weight % '20', Status 'Open', Required 'Yes'. Below Step 3, there is a 'Custom Description' checkbox (checked) and an 'Other Description' field with the text 'Research other programs the bank offers'. At the bottom right, there are 'Save' and 'Cancel' buttons.

Step Order	Step Description	Step Date	Target Date	Status	Completion Date
✓ 1	Research Banks	11/21/2022		Open	
	Weight %	40		Required *	Yes
✓ 2	Set-up and Attend Meeting to c	11/21/2022		Open	
	Weight %	40		Required *	Yes
✓ 3	Other1	11/21/2022		Open	
	Custom Description <input checked="" type="checkbox"/>		Other Description		
	Weight %	20		Required *	Yes
					Research other programs the bank offers

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.

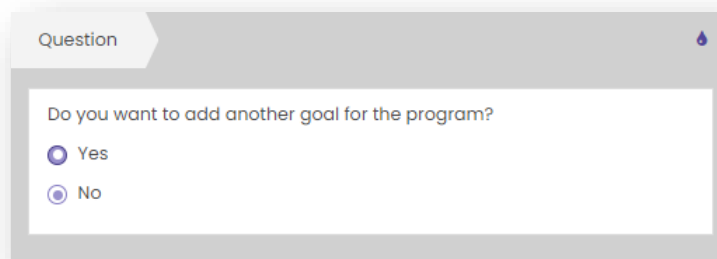
The step's weight and requirements default to the values set during the goal step mapping process, but the User can choose to change them. Remember, all the required steps should have a total weight of 100%.

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'.



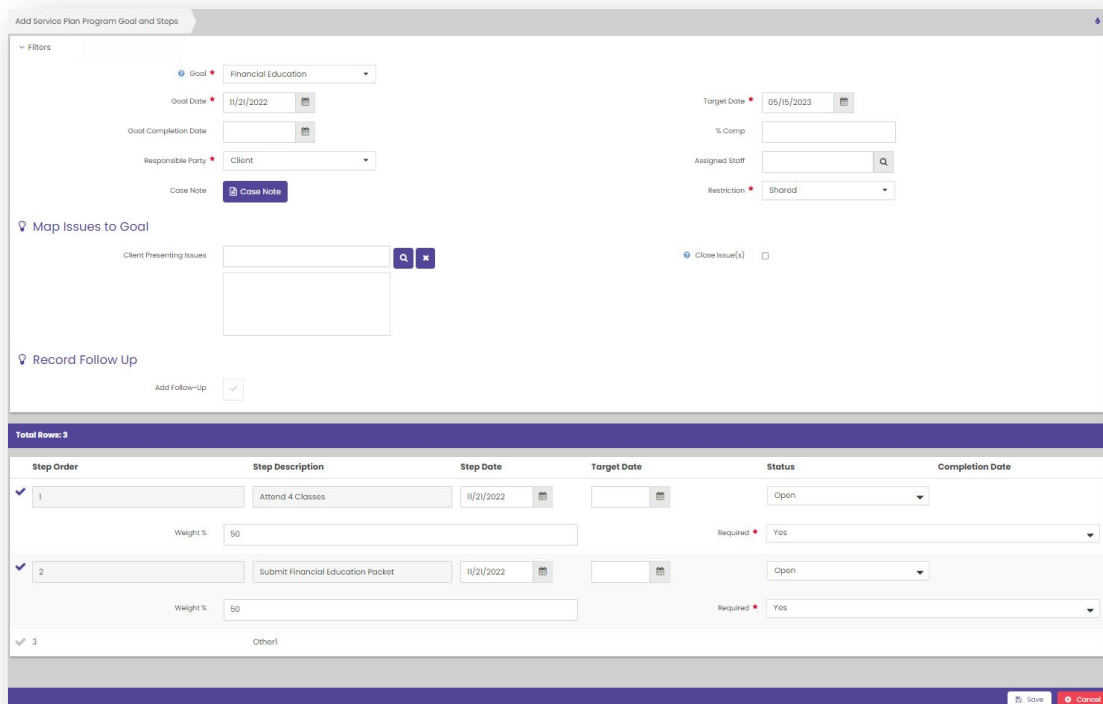
Question

Do you want to add another goal for the program?

☒ Yes

☐ No

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



Add Service Plan Program Goal and Steps

Filters

Goal: Financial Education

Goal Date: 11/21/2022

Goal Completion Date:

Responsible Party: Client

Case Note: [Add Case Note](#)

Target Date: 05/15/2023

% Comp:

Assigned Staff:

Restriction: Shared

Map Issues to Goal

Client Presenting Issues:

Record Follow Up

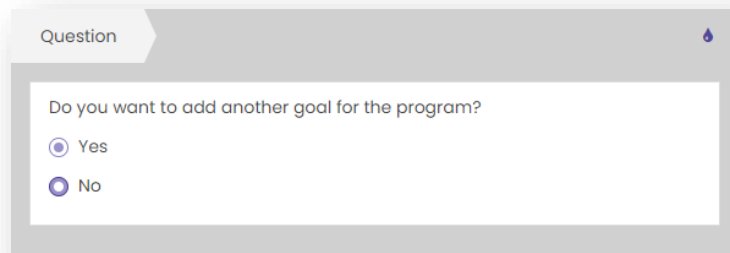
Add Follow-Up: ☒

Total Rows: 3

Step Order	Step Description	Step Date	Target Date	Status	Completion Date
1	Attend 4 Classes	11/21/2022		Open	
	Weight %: 50			Required: Yes	
2	Submit Financial Education Packet	11/21/2022		Open	
	Weight %: 50			Required: Yes	
3	Other:				

[Save](#) [Cancel](#)

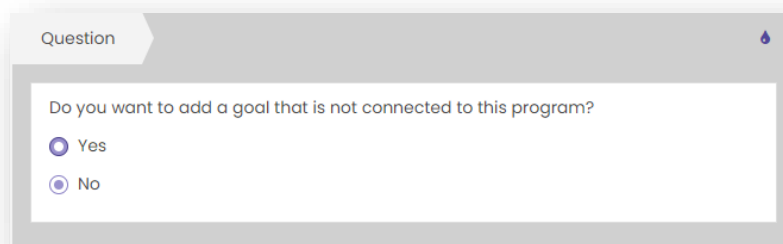
Once you have added all necessary program goals, select 'No'.



A screenshot of a software dialog box titled "Question". The box has a light gray header with the title and a small blue icon on the right. The main content area is white and contains the text "Do you want to add another goal for the program?". Below the text are two radio button options: "Yes" and "No". The "No" option is selected, indicated by a filled blue circle.

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.



A screenshot of a software dialog box titled "Question". The box has a light gray header with the title and a small blue icon on the right. The main content area is white and contains the text "Do you want to add a goal that is not connected to this program?". Below the text are two radio button options: "Yes" and "No". The "No" option is selected, indicated by a filled blue circle.

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.

The screenshot shows a web application interface for adding a service plan goal. On the left is a sidebar with a menu of options: 'Service Plan (Input)', 'Add Service Plan Progra...', 'Question', 'Add Service Plan Goal a...', 'Question', 'Goal Plan Summary - Wor...', 'Service Plan Report', 'Question', and 'Question'. The main area is titled 'Add Service Plan Goal and Steps'. It features a 'Filters' section with a dropdown menu for 'Goal' (currently showing '--Nothing--') and a list of goal options: 'Ability to follow rules and instructions.', 'Ability to give and take in situations. (Sharing)', 'Acquire GED', 'Acquire Stable Housing', and 'Acquire needed docs'. Below this is a 'Map Issues to Goal' section with a 'Client Presenting Issues' text area and a 'Map Issue(s)' button. To the right of the filters are input fields for 'Target Date', '% Comp', 'Assigned Staff', and 'Restriction' (set to 'Shared'). At the bottom right are 'Save' and 'Cancel' buttons.

Otherwise, select 'No' and SAVE.

Question – Service Plan Report

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

The screenshot shows a 'Question' dialog box with the text 'Do you want to print the service plan?'. Below the text are two radio button options: 'Yes' and 'No'. The 'No' option is selected.

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

Service Plan Report

Scheduled Reports

The following options provide specific filters of printable areas on the Service Plan. The areas default to print all areas. To suppress an area, deselect the checkbox.

Report Defaults Save

Income & Expenses * None

Plan & Goal Notes * Both Plan and Goal Notes

Service & Time * Both Services and Time

Include Plan Outcomes ☒

Include Goal Steps ☒

Plan & Goal History * None

Issues & Actions Taken * None

Add Signature Line ☒

Report Details

Program

Case Manager

Plan Begin Date *

Plan End Date *

Service Plan Description

Percent Complete

Report Cancel

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.

Goal Plan Summary - Workflow

Filters

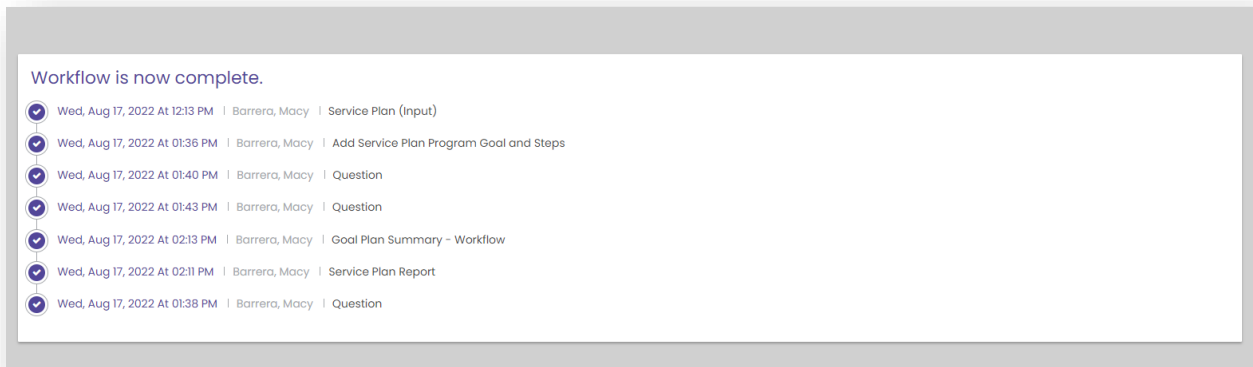
The following list represents Client Goals that are linked to a specific Service Plan.

Total Rows: 3

Goal Description	Goal Target Date	Goal Date	Hours Budget	Hours Used	Progress Notes	Steps
Establish Checking and Savings Accounts	2/20/2023	11/21/2022	0.00	0.00		
Financial Education	5/15/2023	11/21/2022	0.00	0.00		
Save \$500	7/17/2023	11/21/2022	0.00	0.00		
			SUM : 0.00	SUM : 0.00		

Results Per Page: 50

Click DONE to complete the workflow.



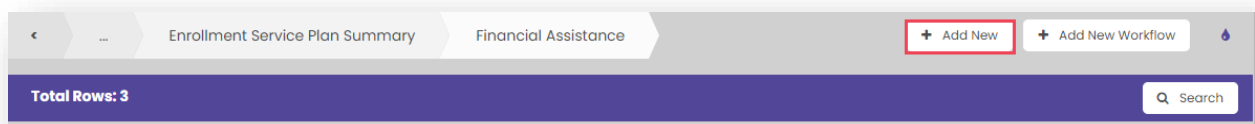
This concludes the *Service Plan Workflow* video. The next video in the series details how to enter Preset Service Plans and how to create a new service plan from a copy of an existing plan.

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.

A screenshot of the 'Enter Enrollment Service Plan' form. The form has a title 'Enrollment Service Plan Dates' with a lightbulb icon. It contains several input fields and a dropdown menu. The 'Begin Date' field is set to '11/17/2022'. The 'Plan Projected End Date' field is set to '11/17/2023'. The 'Copy Plan' dropdown menu is open, showing options: 'Enter Plan Manually', '--Nothing--', 'Enter Plan Manually', 'Create New Plan from Program', and 'Create New Plan From Existing Plan'. The 'Family Or Individual' field is set to '--Nothing--'. The 'Actual Completed Date' field is empty.

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.

The screenshot shows a form titled "Enrollment Service Plan Dates". It contains several input fields and dropdown menus. On the left side, there is a "Begin Date" field with a calendar icon, showing "08/18/2022". Below it is a "Copy Plan" dropdown menu with the option "Create New Plan from Program" selected. Further down is a "Copy Program Plans" dropdown menu, which is currently empty. At the bottom left is a "Family Or Individual" field with a dropdown menu showing "Description" and "Financial Plan". On the right side, there is a "Plan Projected End Date" field with a calendar icon, showing "08/18/2023". At the bottom right is an "Actual Completed Date" field with a calendar icon, which is currently empty.

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.

Plan Information

Case Manager ★ Saba

Percent Complete

Plan Description ★ Service Support Plan - Financial

Initial Case Note

Post Follow-up or Outcome ☒

Add Follow Up or Outcome

Add Follow-Up ☒

Record Outcome ☒

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 be 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.

Case Note and Signature(s).

Date 11/17/2022 11:15:31 PM
Name of Signatory Saba Vega
Signatory Role/Title Case Manager

Date 11/17/2022 11:15:47 PM
Name of Signatory Joe Beltran
Signatory Role/Title Client

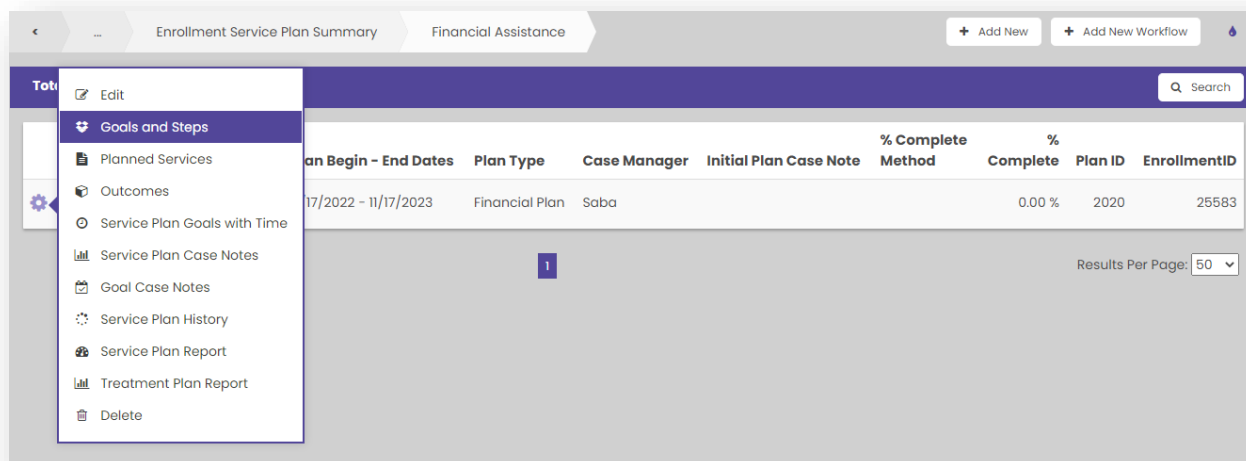
Link to Presenting Issues ☒

Issue ☐ All ☒ Some

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.

Goals and Steps




Goals Summary

Filters

Total Rows: 3

Add New Goals / Steps

Add New Program Goals/Steps

Goal Date	Goal Description	Target Date	Completed Date	Required	Weight %	Complete %	Initial Goal Case Note	Type ID	Goal ID
 11/17/2022	Establish Checking and Savings Accounts	2/15/2023		Yes	40.00%	0.00%		48	2658
 11/17/2022	Financial Education	1/16/2023		Yes	40.00%	0.00%		52	2659
 11/17/2022	Save \$500	2/15/2023		Yes	20.00%	0.00%		10003	2660

Each [goal includes its mapped goal steps](#).

Edit Goals and Steps

Edit Goal with Line Item

Goal *

Establish Checking and Savings Accounts

Goal Date *

11/17/2022

Goal Completion Date

Responsible Party *

Client

Goal Weight % to Plan

40

Initial Goal Case Note

Case Note

Restriction *

Shared

Record Outcome

Target Date *

02/15/2023

% Comp

0

Assigned Staff

Required Goal *

Yes

Goal Progress Note

Map Presenting Issues to Goals

Total Rows: 3

Step Order	Step Description	Step Date	Target Date	Weight	Complete	Status	Completion Date
✓ 1	Research Banks	11/17/2022	12/17/2022	40%	0.00%	Open	
✓ 2	Set-up and Attend Meeting to Open Accounts	11/17/2022	1/16/2023	40%	0.00%	Open	
✓ 3	Other1	11/17/2022	2/15/2023	20%	0.00%	Open	

Save

Cancel

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.

<

...

Enrollment Service Plan Summary

Adult Education

+ Add New

+ Add New Workflow

Total Rows: 1

Q Search

Description	Plan Begin - End Dates	Plan Type	Case Manager	Initial Plan Case Note	% Complete Method	% Complete	Plan ID	EnrollmentID
<div><div><div></div></div><div>GED - Service Plan</div></div>	4/1/2022 - 10/1/2022	Earn GED	Saba	<div><div></div></div>		30.00 %	2030	25596

Again, click ADD NEW.

Enrollment Service Plan Dates

Begin Date ★ 11/22/2022

Plan Projected End Date ★ 05/01/2024

Copy Plan Create New Plan From Existing Plan

Copy Service Plan ★ GED - Service Plan

Family Or Individual Individual

Actual Completed Date

Goal and Step % Complete ★ Rules --Nothing--

Copy Date Preferences ★ (Occurance)

Percent Complete

Plan Information

Case Manager ★

Plan Description ★

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.

Enter Enrollment Service Plan

Enrollment Service Plan Dates

Begin Date ★ 11/22/2022

Plan Projected End Date ★ 05/01/2024

Copy Plan Create New Plan From Existing Plan

Copy Service Plan ★ GED - Service Plan

Family Or Individual Individual

Actual Completed Date

Goal and Step % Complete ★ Rules Do Not Copy Goals that are 100% Co

Copy Date Preferences ★ (Occurrence)

--Nothing--
Monthly (30 - Days)
Quarterly (90 Days)
Semi-Annually (180 Days)
Annually (365 Days)

Plan Information

Case Manager ★ Saba

Percent Complete

Plan Description ★

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.

Plan Information

Case Manager ★ Saba

Percent Complete

Plan Description ★ GED - Service Plan 2

Initial Case Note Case Note

Post Follow-up or Outcome ☐

Case Note and Signature(s).

Add Signature

Link to Presenting Issues ☒

Issue ☒ All ☐ Some

Lacks High School Diploma

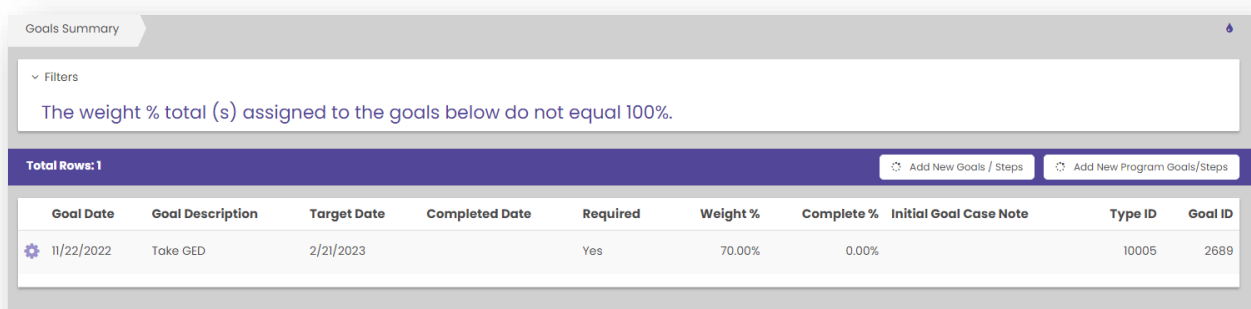
Save Cancel

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.



The screenshot shows a 'Goals Summary' window. At the top, there's a 'Filters' section with a message: 'The weight % total (s) assigned to the goals below do not equal 100%.' Below this, a purple bar indicates 'Total Rows: 1' and includes buttons for 'Add New Goals / Steps' and 'Add New Program Goals/Steps'. The main content is a table with the following data:

Goal Date	Goal Description	Target Date	Completed Date	Required	Weight %	Complete %	Initial Goal Case Note	Type ID	Goal ID
11/22/2022	Take GED	2/21/2023		Yes	70.00%	0.00%		10005	2689

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

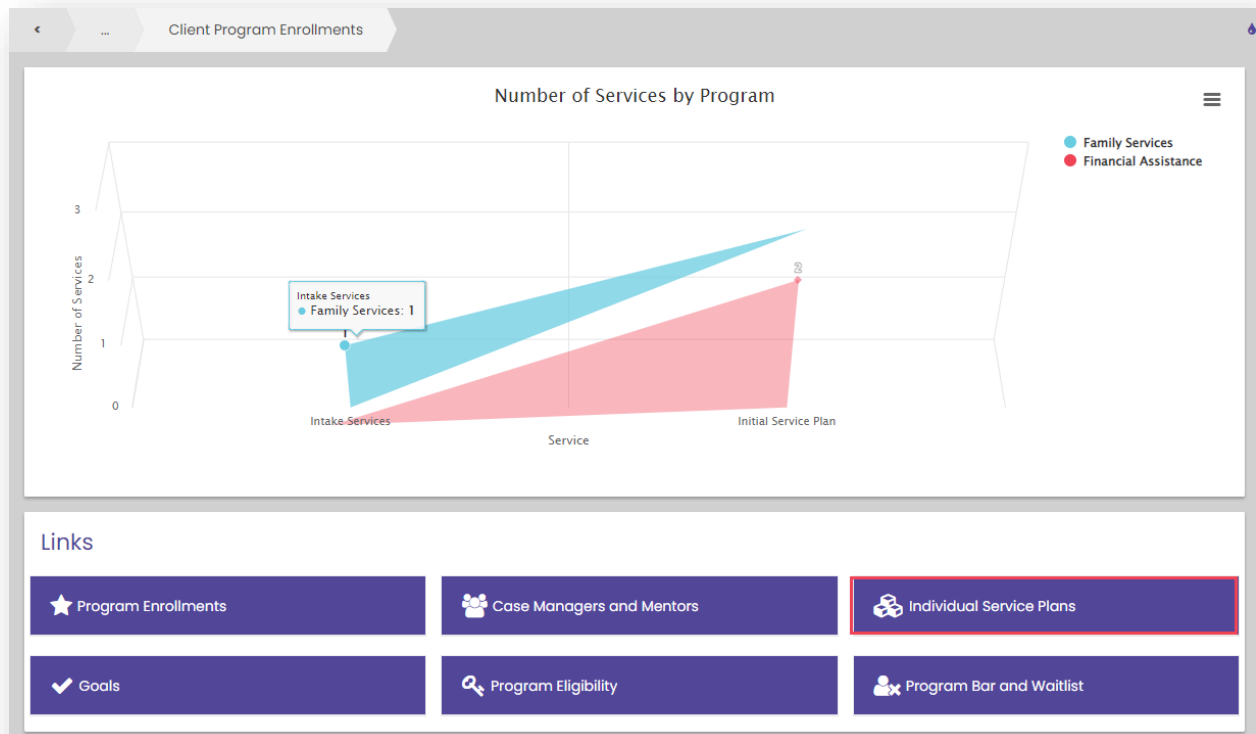
Managing Service Plans

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

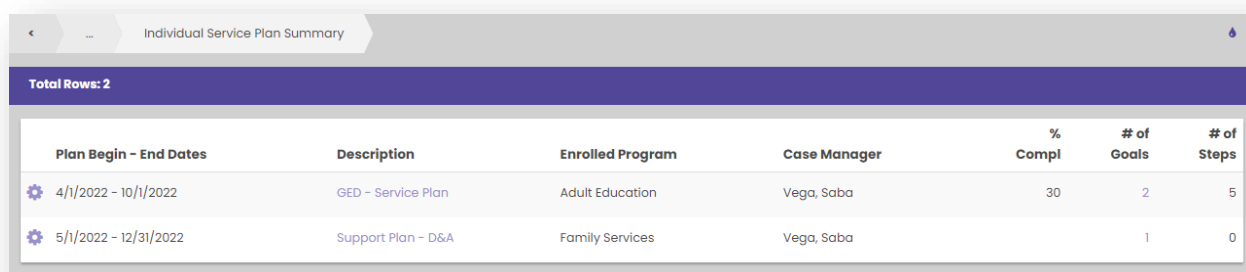
While the *Enrollment Service Plan Summary* form can be used for continual management, the *Client Program Enrollment* dashboard provides quicker access to update all of a Client's Service Plans.

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.



The screenshot shows a web interface titled "Individual Service Plan Summary". Below the title is a purple bar indicating "Total Rows: 2". The main content is a table with the following data:

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.

The screenshot shows the 'Edit Service Plan' interface. It has two main sections: 'Enrollment Service Plan Dates' and 'Plan Information'. In the 'Enrollment Service Plan Dates' section, 'Begin Date' is 04/01/2022, 'Plan Projected End Date' is 10/01/2022, 'Family or Individual' is set to 'Individual', and 'Actual Completed Date' is 11/22/2022 (highlighted with a red box). In the 'Plan Information' section, 'Case Manager' is 'Saba', 'Percent Complete' is 100 (highlighted with a red box), and 'Plan Description' is 'GED - Service Plan'. There are buttons for 'Progress Note', 'Initial Case Note', and 'Case Note'. At the bottom, there is a checkbox for 'Post Follow-up or Outcome'.

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

The screenshot shows the 'Record Outcome' form. It has a header 'Record Outcome' and a sub-header 'Post Plan Outcomes'. The form contains three fields: 'Outcome Date' is 11/22/2022, 'Outcome' is 'Earn GED', and 'Score' is 'Successfully earned GED'. Each field has a dropdown arrow next to it.

[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.

← ... Edit Service Plan

💡 Enrollment Service Plan Dates

Begin Date * 04/01/2022

Plan Projected End Date * 10/01/2022

Family or Individual Individual ▾

Actual Completed Date 11/22/2022

💡 Plan Information

Case Manager * Saba

Percent Complete 100

Plan Description * GED - Service Plan

Progress Note

Initial Case Note Case Note

Post Follow-up or Outcome ☒

💡 Add Follow Up or Outcome

Add Follow-Up ▾

Record Outcome Edit

💡 Case Note and Signature(s).

Add Signature

Save Cancel

Goals and Steps

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

← ... Goals Summary

▼ Filters

Total Rows: 2 Add New Goals / Steps Add New Program Goals/Steps

Goal Date	Goal Description	Target Date	Completed Date	Required	Weight %	Complete %	Initial Goal Case Note	Type ID	Goal ID
4/1/2022	Prepare for GED	6/30/2022	7/1/2022	Yes	30.00%	100.00%		10004	2685
4/1/2022	Take GED	6/30/2022		Yes	70.00%	0.00%		10005	2686

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.

Filters

Goal * Take GED

Goal Date * 04/01/2022

Goal Completion Date * 11/22/2022

Responsible Party * Client

Goal Weight % to Plan 70

Initial Goal Case Note Case Note

Restriction * Shared

Record Outcome ☒

Target Date * 06/30/2022

% Comp 100

Assigned Staff

Required Goal * Yes

Goal Progress Note

Map Presenting Issues to Goals ☐

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.

Total Rows: 3

Step Order	Step Description	Step Date	Target Date	Weight	Complete	Status	Completion Date
1	Research Testing Locations	04/01/2022	04/01/2022	25	0.00	Open	
Custom Description <input type="checkbox"/>							
Required Yes							
2	Register for Test	4/1/2022	4/1/2022	25%	0.00%	Open	
3	Complete all parts of the test	4/1/2022	4/1/2022	50%	0.00%	Open	

Save Cancel

Add New Progress Note

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

The screenshot shows the 'Goal Progress Notes Add New' form. It includes fields for 'Reference Date' (11/01/2022), 'Template' (empty), 'Case Note Summary' (Client Call), and 'Case Note' (Johnny reached out to get more information about the program we had discusses when we last met.). A red box highlights the 'Type' dropdown menu, which is set to 'Goal / Progress Notes'. The 'Restriction' dropdown is set to 'Shared'. The bottom of the form has 'Save' and 'Cancel' buttons.

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.

The screenshot shows the 'Goal Notes (Summary)' table. It has a 'Filters' section with 'Print Selected' and 'Print All' buttons. The table has four columns: 'Preview', 'Case Note Summary', 'Reference Date', and 'Created Date'. There are two rows of data.

Preview	Case Note Summary	Reference Date	Created Date
	GED Prep - complete	11/22/2022	11/22/2022 6:39 PM
	GED - Complete	11/22/2022	11/22/2022 6:55 PM

Goal History

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

Goal History						
Filters						
Total Rows: 2						
Review Date	Reviewer	Goal Date	Target Date	Completed Date	Percent Complete	Goal Description
11/22/2022 6:41 PM	Saba	4/1/2022	6/30/2022	7/1/2022	100.00%	Prepare for GED










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.

Goal Case Notes (Summary)					
Filters					
		Print Selected		Print All	
Preview	Note Type	Case Note Summary	Reference Date	Created Date	CaseNoteID
Goal - Take GED					
  	Progress	GED registration	10/1/2022	11/22/2022 7:10 PM	13402
Goal - Prepare for GED					
  	Progress	Client Call	11/1/2022	11/22/2022 7:05 PM	13401
  	Progress	GED Prep - complete	11/22/2022	11/22/2022 6:39 PM	13399

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



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: OGDENState: UTYip Code: 84201

Phone Number:Fax Number:

Client/Case Information

Name: Berline, JohnnyGender: Male

SSN: 549-74-6444Date of Birth: 8/15/1994

Client ID: 24461

Enrollment ID: 25594Enrollment 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 - Client11/22/2022

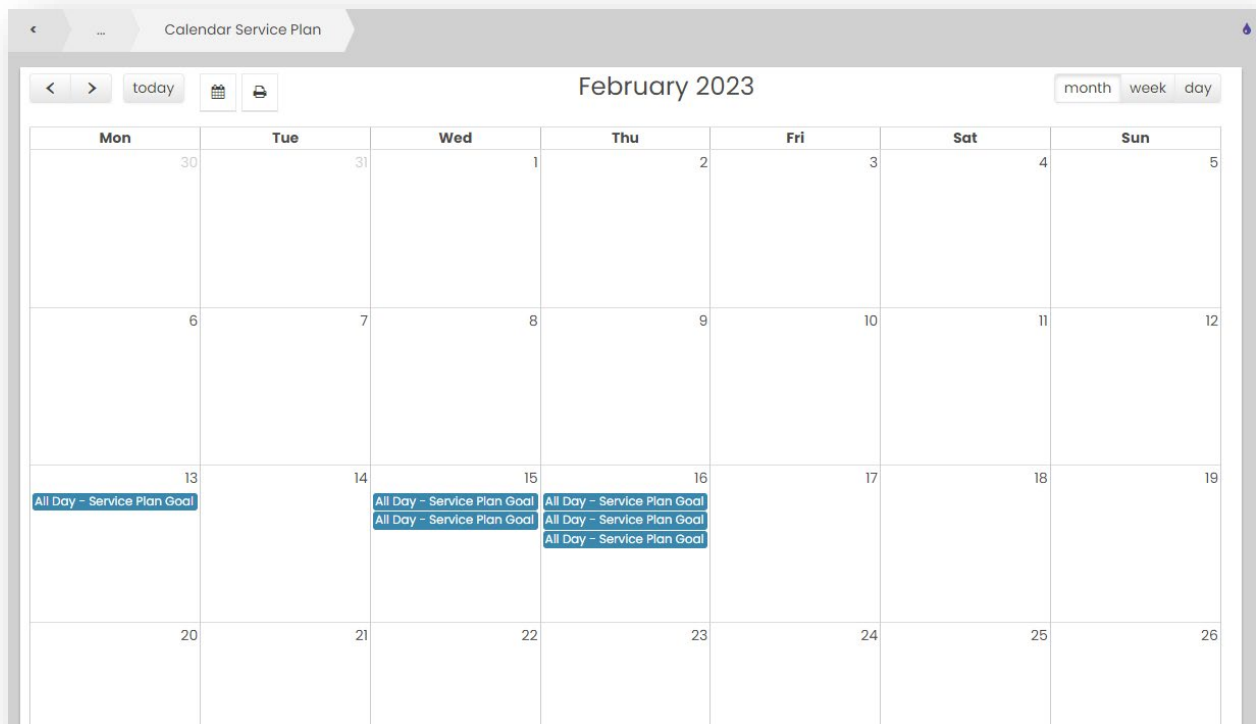

Saba Vega - Case Manager11/22/2022

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

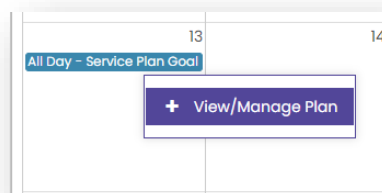
The Service Plan Calendar is a helpful tool for Case Managers to view their Client's Service Plan due dates and easily access the plans for management.



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.



Individual Service Plan Summary

Tot

Edit

Goals and Steps

View Notes

Outcomes

Plan History

Service Plan Report

Treatment Plan Report

Delete

Description	Enrolled Program	Case Manager	% Compl	# of Goals	# of Steps
Service Plan - Financial Advancement	Financial Assistance	Vega, Saba	100	4	7

1

Results Per Page: 50

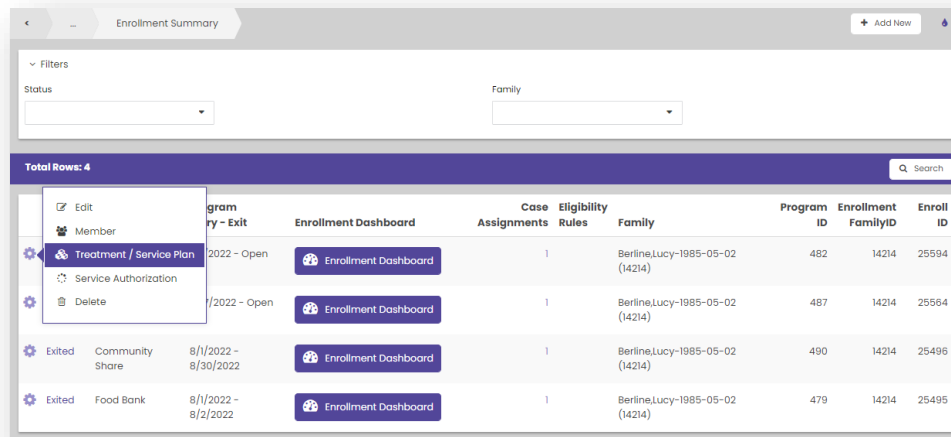
This concludes the *Managing Service Plans* video. The next video explores the *Service Plan Report*.

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**.



The screenshot shows a web application interface for 'Enrollment Summary'. At the top, there are filters for 'Status' and 'Family'. Below the filters, a table lists enrollment records. The table has columns for 'Program', 'Enrollment Dashboard', 'Case Assignments', 'Eligibility Rules', 'Family', 'Program ID', 'Enrollment FamilyID', and 'Enroll ID'. Four rows are visible, each with an 'Enrollment Dashboard' button. The first row is selected, and its action menu is open, showing options: 'Edit', 'Member', 'Treatment / Service Plan' (highlighted), 'Service Authorization', and 'Delete'.

Program	Enrollment Dashboard	Case Assignments	Eligibility Rules	Family	Program ID	Enrollment FamilyID	Enroll ID
2022 - Open	Enrollment Dashboard	1		Berline,Lucy-1985-05-02 (14214)	482	14214	25594
/2022 - Open	Enrollment Dashboard	1		Berline,Lucy-1985-05-02 (14214)	487	14214	25564
Exited Community Share 8/1/2022 - 8/30/2022	Enrollment Dashboard	1		Berline,Lucy-1985-05-02 (14214)	490	14214	25496
Exited Food Bank 8/1/2022 - 8/2/2022	Enrollment Dashboard	1		Berline,Lucy-1985-05-02 (14214)	479	14214	25495

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.

The following options provide specific filters of printable areas on the Service Plan. The areas default to print all areas. To suppress an area, deselect the checkbox.

Report Defaults

Income & Expenses ☒ Both Income and Expenses

Plan & Goal Notes ☒ Both Plan and Goal Notes

Service & Time ☒ Both Services and Time

Plan & Goal History ☒ Both Plan and Goal History

Issues & Actions Taken ☒ Both Issues and Actions Taken

Include Plan Outcomes ☒

Include Goal Steps ☒

Add Signature Line ☒

Report Details

Program

Case Manager

Plan Begin Date

Plan End Date

Service Plan Description

Percent Complete

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 - Continenence, 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.

	
<input type="checkbox"/>	<input type="checkbox"/>
Client Signature	Agency Representative
11/22/2022	11/22/2022
Date	Date

Report Details

The Report Details displays specifics of the service plan.

The following options provide specific filters of printable areas on the Service Plan. The areas default to print all areas. To suppress an area, deselect the checkbox.

Report Defaults: [Dropdown] [Save]

Income & Expenses: [Both Income and Expenses] Plan & Goal History: [Both Plan and Goal History]

Plan & Goal Notes: [Both Plan and Goal Notes] Issues & Actions Taken: [Both Issues and Actions Taken]

Service & Time: [Both Services and Time]

Include Plan Outcomes: ☒ Add Signature Line: ☒

Include Goal Steps: ☒

Report Details

Program: [Adult Education] Case Manager: [Vega]

Plan Begin Date: [04/01/2022] Plan End Date: [10/01/2022]

Service Plan Description: [GED - Service Plan] Percent Complete: [70]

[Report] [Cancel]

Click REPORT to generate it.

Service Plan for Johnny Berline

Run by Saba - Alliance for Community Trust on 11/22/2022 at 1:14 PM

CaseWorthy

Show Income:	Yes	Show Goal Steps:	Yes
Show Expenses:	Yes	Show Outcomes:	Yes
Show Issues:	Yes	Show Plan Notes:	Yes
Show Actions:	Yes	Show Goal Notes:	Yes

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

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

This concludes the *Service Plans* video series.