



Creating Case Plan & Notes










1. Click on the **Case Plan** tab.

Client Information						Service Transactions			
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Measurements	Activities	Assessments

2. Select **Add Goal**.

Goals							
Date Added	Provider	Classification	Type	Status	Outcome	Notes	Latest Note Date
Add Goal				No matches.			

3. Fill out the **Provider Name, Classification, and Type**. Select **Add Goal**. Set a **Target Date** and **Overall Status**. Then click **Add Goal**. A **Follow-up** for your next CM session with can be scheduled here or in any of the below section

Provider *	St Vincent De Paul - DCF - ESG Homelessness Prevention (169) ▼
Case Manager	-Select- ▼
Date Goal was Set *	05 / 01 / 2021   
Classification *	Housing ▼
Type *	Achieve housing stability ▼
Goal Description	<div></div>
Target Date	06 / 01 / 2021   
Overall Status *	Identified ▼
If Closed, Outcome	-Select- ▼ <div> / /   </div>
If Partially Complete, Percent Complete	-Select- ▼

4. Select **Add Case Notes**.

Each time you meet with client to discuss his/her case plan, a note should be recorded regarding this interaction.

Case notes can include objectives and action steps. However, they should always be non-defamatory using motivational interviewing to allow clients to set their own goals. They should be done from a trauma informed perspective with a detailed description of events taken place in CM session.

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










5. Select **Add Action Step**.

Action Steps Planned










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

6. Create an **Action Step**

Enter the steps that are needed to achieve the selected goal. You can create one for each Action needed or list them out in one. If entering all in one, you will want to update the note sections each time one has been accomplish.











Provider*	St Vincent De Paul - DCF - ESG Homelessness Prevention (169) ▼		
Date Action Step was set*	05 / 01 / 2021	  	
Action Step*	<div>CL will apply for 3 jobs</div>		
Target Date	05 / 16 / 2021	  	
Overall Status*	Identified ▼		
If Closed, Outcome	-Select- ▼	<input type="text"/> / <input type="text"/> / <input type="text"/>	  

7. Some funding sources, like ESG HP require you complete re-evaluation for clients once every 3 months or annually, like ESG RRH if client is still enrolled beyond 12 months in program. So, you may also want to create an **Action Step** for these (90, 180, etc.).

Provider*	St Vincent De Paul - DCF - ESG Homelessness Prevention (169) ▼		
Date Action Step was set*	05 / 01 / 2021	  	
Action Step*	<div>3 Month Re-Evaluation</div>		
Target Date	08 / 01 / 2021	  	
Overall Status*	Identified ▼		
If Closed, Outcome	-Select- ▼	<input type="text"/> / <input type="text"/> / <input type="text"/>	  







8. Set the **Projected Follow-Up Date** to Correspond with **Action Step**. **Save Action Step**.

Projected Follow Up Date	08 / 01 / 2021   
Follow Up User	St. Vincent de Paul - County - Community CARES (263)  Jennifer Hines 
Follow Up Made	-Select- 
Completed Follow Up Date	/ /   
Outcome at Follow Up	-Select- 

9. When completing the above Action Steps, you will want to set a corresponding follow-up date for each. This will ensure that follow ups will appear on your home page and can be conducted within the time frame.

Note: Additional Action Steps can be continually added throughout the client's enrollment in program

Action Steps Planned					
	Action Step	Target Date	Status	Outcome	
	3 Month Re-Evaluation	08/01/2021	Identified		
	CL will apply for 3 jobs	05/16/2021	Identified		
Add Action Step		Showing 1-2 of 2			

10. Each time you meet with client a Case/Care service should be recorded. This can be done directly from here by clicking on **Add Service**.

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



To Complete Follow-Ups/Re-Evaluation

Ensure you are in the **proper EDA**. Locate the **Client** on your **Follow-Up** list. Click on the **Client ID** to go to the client's page for the **Re-Evaluation** to be completed.

Follow Up List (4)			
Client ID	Type	Date	Time Remaining
2	Action Step	05/16/2021	Past
3	Action Step	05/16/2021	Past
2	Action Step	08/01/2021	54 Days
3	Action Step	08/01/2021	54 Days

- Go to the client's **Entry/Exit** and complete a **Re-Evaluation** for the correct **Entry/Exit** by selecting **Interims**

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups
Community Service Block Grant - Salvation Army - Sarasota (4828)	Basic	09/18/2020	09/18/2020		

- Add **Interim** for the Re-Evaluation date you are conducting (90, 180, Annual, ect.).

Follow Up Reviews Associated with this Entry / Exit		
Review Date	Review Type	Client Count
<div>Add Follow Up Review</div> <div>No matches.</div>		

- Complete by reviewing / updating questions required by the project.
Save & Exit.

- Go to the client's **Case Plan** and select the **pencil** to open the case plan, scroll to the **Action Step** and click the pencil next to the follow-up you have completed.

Action Steps Planned					
	Action Step	Target Date	Status	Outcome	
	3 Month Re-Evaluation	08/01/2021	Identified		
	CL will apply for 3 jobs	05/16/2021	Identified		
<div>Add Action Step</div>		Showing 1-2 of 2			

- Indicate the follow-up has been made by selecting **Yes**, adding the **date**, and **outcome**. **Save.**

Projected Follow Up Date	08 / 01 / 2021			
Follow Up User	<div>St Vincent De Paul - DCF - ESG Homelessness Prevention (169)</div> <div>Jennifer Hines</div>			
Follow Up Made	Yes			
Completed Follow Up Date	08 / 01 / 2021			
Outcome at Follow Up	<div>Achieved</div> <div></div>			

- Do these same steps for each follow-up.