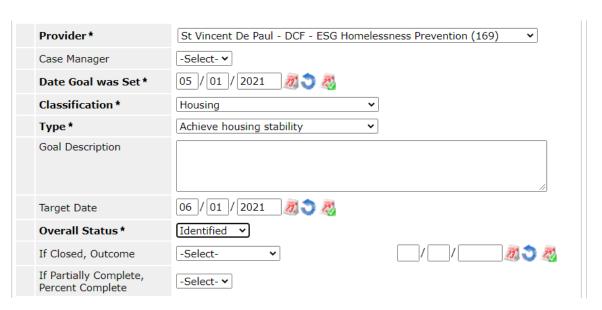


Creating Case Plan & Notes

1. Click on the Case Plan tab.



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



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.





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.



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.).





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

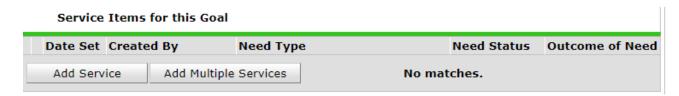
Projected Follow Up Date	08 / 01 / 2021 💆 💸	
Follow Up User	St. Vincent de Paul - County - Community CARES (263) Jennifer Hines	
Follow Up Made	-Select- ▼	
Completed Follow Up Date / / / /		
Outcome at Follow Up	-Select- ▼	

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



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.**





To Complete Follow-Ups/Re-Evaluation

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



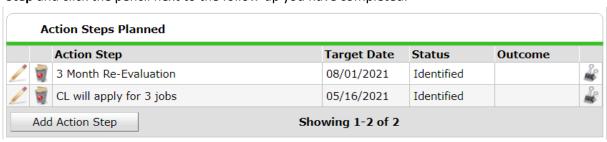
 Go to the client's Entry/Exit and complete a Re-Evaluation for the correct Entry/Exit by selecting Interims



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



- 3. Complete by reviewing / updating questions required by the project. **Save & Exit.**
- 4. 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.



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



6. Do these same steps for each follow-up.