



Quick Guide to Weekly Motel Update Case Notes

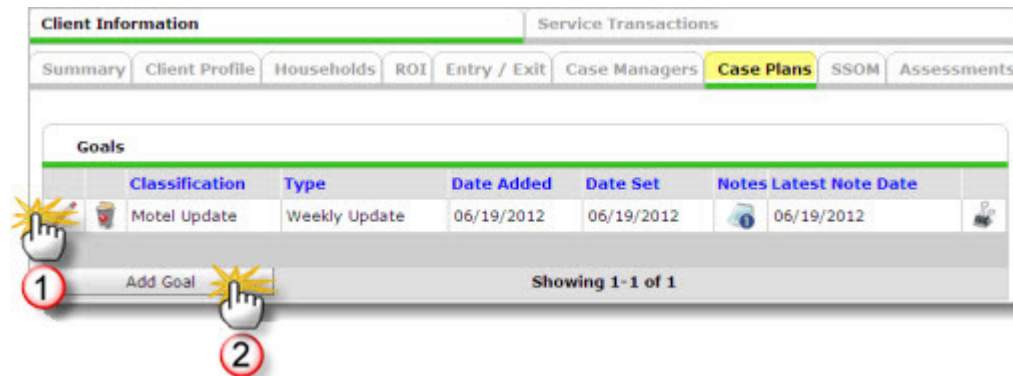
This worksheet presents step-by-step instructions for creating a Motel Update goal in ServicePoint 5, and entering Weekly Update notes under the goal.

Step One: Enter the Client Profile

In **ClientPoint**, search for the client for whom you want to create the **Motel Update**.

Enter the **Client Profile**.

Step Two: Go to the Case Plans Tab



- 1 If there **is** already a **Motel Update** goal, click the **pencil**.
 - ▶ Go to **Step Four: Add Weekly Update Case Note**, below.
- 2 If there **is not** already a **Motel Update** goal, click the **Add Goal** button.
 - ▶ Go to **Step Three: Add Motel Update Goal**, below.

Step Three: Add Motel Update Goal

Goal - (4) Duck, Donald

Household Members

Note: To include Household members for this Goal, click the box beside each name. Only members from the SAME Household may be selected.

1 (2) Two Parent Family

(4) Duck, Donald (6) Duck, Huey

(5) Duck, Daisy (8) Duck, Louie

(7) Duck, Dewey

Provider * Housing Stabilization Services-Shelter/Hotel (71)

Case Manager -Select-

Date Goal was Set * 06 / 19 / 2012

2 **Classification *** Motel Update

3 **Type *** Weekly Update

Goal Description

Target Date

4 **Overall Status *** In Progress

If Closed, Outcome -Select-

If Partially Complete, Percent Complete -Select-

Projected Follow Up Date

Follow Up User Housing Stabilization Services-Shelter/Hotel (71)

Follow Up Made -Select-

Completed Follow Up Date

Outcome at Follow Up -Select-

The **Motel Update** is a simple goal. You only need to complete the mandatory items shown in **bold** on the goal.

- 1** Only include the **Head of Household** in the Motel Update goal.
- 2** Select **Motel Update** from the Classification drop-down.
- 3** Select **Weekly Update** from the Type drop-down.
- 4** Select **In Progress** as the Overall Status of the goal.
- 5** Click the **Add Goal** button at the bottom of the screen.

Additional sections will appear at the bottom of the goal (see next page).

NOTE: You only need to add the **Motel Update** goal once. You will add all future **Weekly Updates** under the same goal!

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Step Four: Add Weekly Update Case Note



In the **Case Notes** section, click the **Add Case Note** button.



Enter the **Case Note**. When you are satisfied with the Case Note, click the **Save Case Note** button.

NOTE

Please enter and edit your case notes carefully.

Once you click the **Save Case Note** button, the Case Note becomes a permanent legal record that cannot be edited or deleted!