Case Plans Workflow

Case Plans

The Case Plans portion of ClientPoint allows case managers to assign and track case managers assigned to clients, establish goals and action steps to reach that goal. Service Transactions related to achieving goals can be entered directly in Case Plans. This feature allows case managers and program evaluators to show that goals were or were not achieved, the action steps taken, and the services provided to allow clients to achieve success through case management.

Learning Objectives

After reviewing this presentation, you will understand how to:

- Log into Community Services
- Navigate to the client profile
  - Add client notes
- Navigate to Case Managers
  - Enter case managers
- Navigate to Case Plans
  - Enter action steps
  - Create case notes
  - Add service transactions
  - Print case plans and case notes
  - Upload file attachments

Log Into Community Services

Begin by logging into Community Services using your assigned User Name and Password. Contact your agency or system administrator if you need assistance in accessing Community Services.

Figure 1

ClientPoint – The Filing Cabinet

Search for existing clients or add new clients.

Figure 2

Client Information Tab

The Client Profile, Case Managers, and Case Plans tabs can be used for case management.

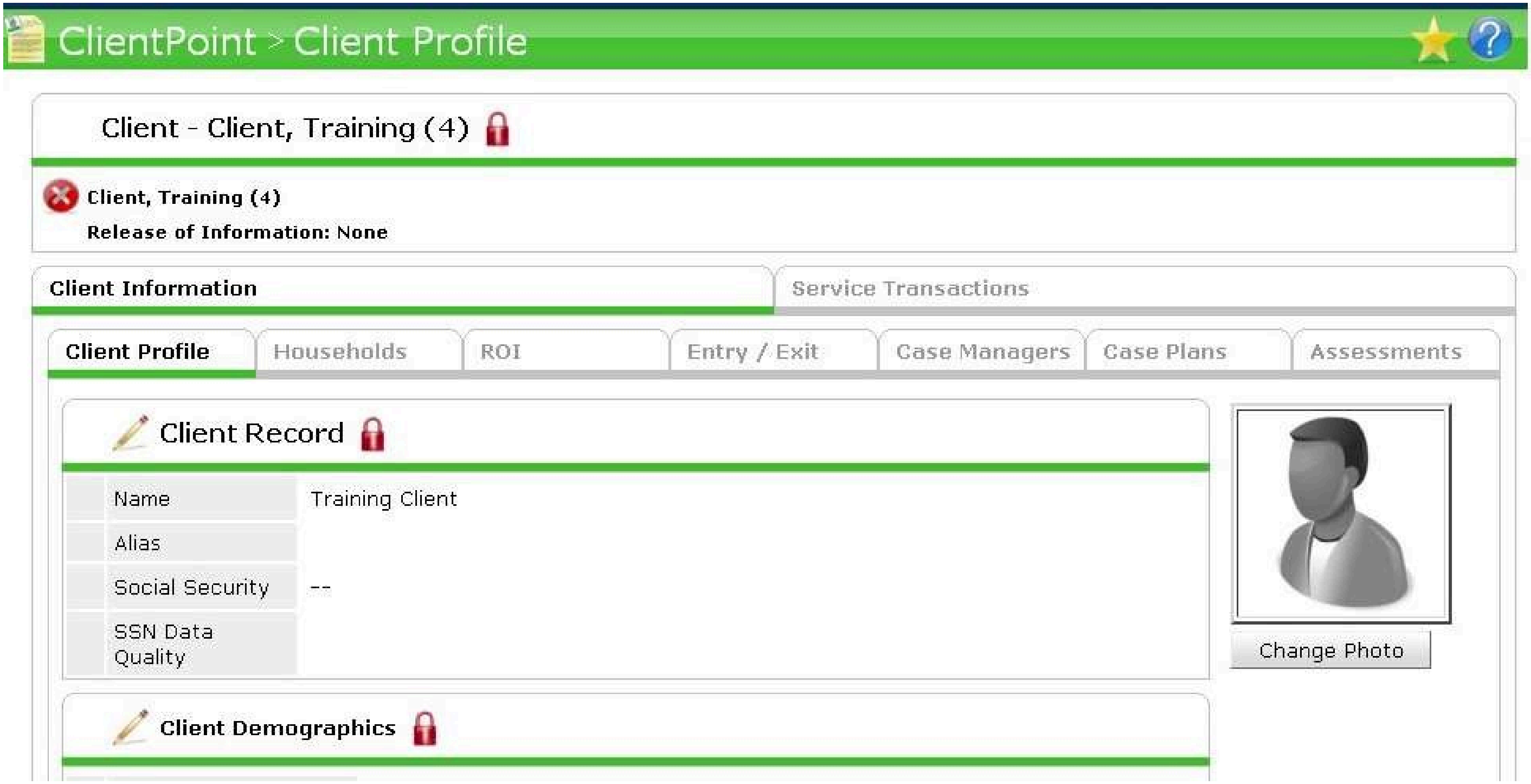


Figure 3

Client Notes

Client Notes are quick case notes that can be entered for clients without having to enter a Goal Classification in the Case Plan section of ClientPoint. To use this feature, navigate to the client.

Figure 4

On the Client Profile screen, scroll down to the Client Notes section. Click Add New Client Note.

Client Notes

		Provider	Note Date	Note Preview	Full Note
		Bowman Systems, LLC	05/01/2011	This is a test	

Add New Client Note Print **Showing 1-1 of 1**

File Attachments

		Date Added	Name	Description	Type	Provider	Added From	
		03/29/2012	ServicePoint Technical Specifications.pdf		pdf	Bowman Systems, LLC	Entry/Exit	

Add New File Attachment **Showing 1-1 of 1**

Figure 5

The Client Note data entry screen is displayed. Enter the date of the note by typing the date or using the calendar. The Note Date is a required field. Type the note, and when you’re finished, click Save.

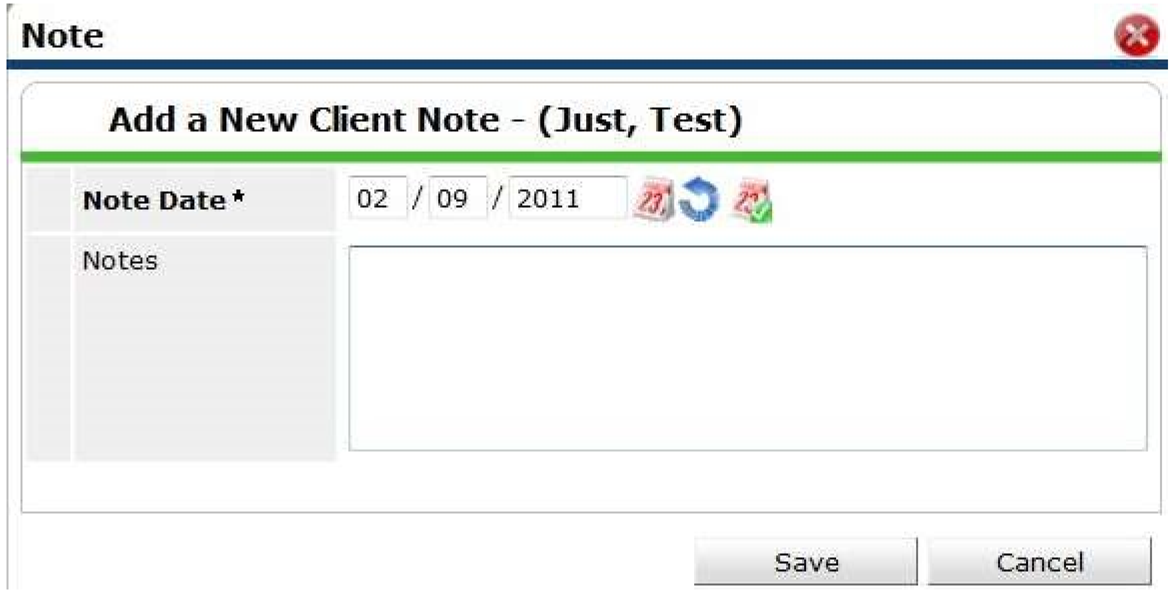


Figure 6

After the note has been saved, a history and a preview of the notes is displayed. To edit or view notes, click the Pencil or the Full Note icons. To delete a note, click the Trash Can icon.

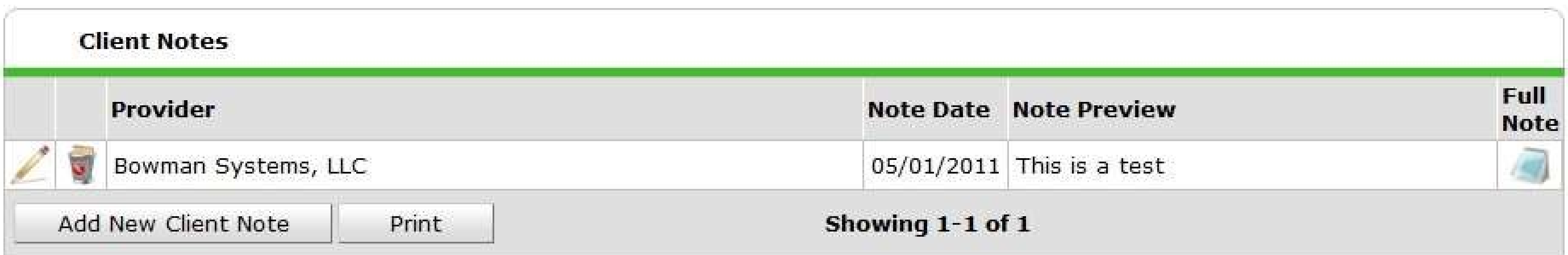


Figure 7

Notes can be printed by clicking Print. Select the time-frame and provider(s) for whom you want to print the case notes.


Client Notes Print Options
Include Client Notes
All
Date Range
Client Note Providers
All
My Provider Only
Print
Cancel

Figure 8

Case Managers

The Case Managers section allows users to assign case managers to clients. To enter a case manager, click the Case Managers tab, then click Add Case Manager.

Figure 9

Note: If users need to assign a case manager to a case plan, the case manager must be entered before moving to Case Plans.

The Case Manager window is displayed. Select the household members that the case manager will also be working with.

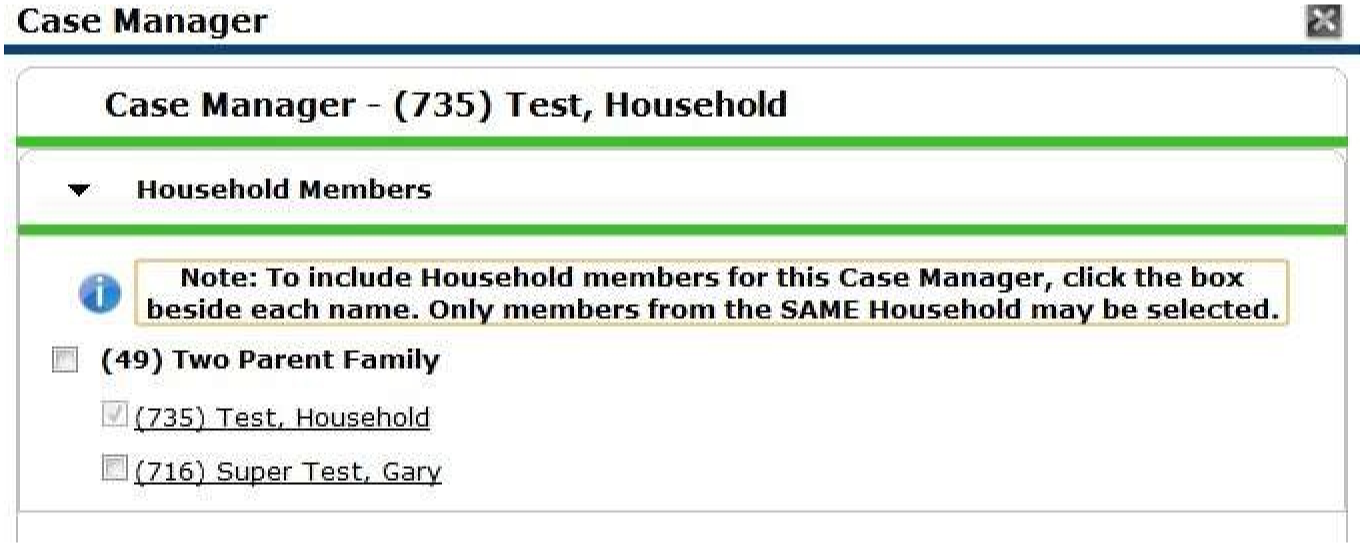


Figure 10

The first way is to select a case manager from a provider. First, select a provider from the Provider list. After the provider is selected, the case manager can be selected from the drop-down list.

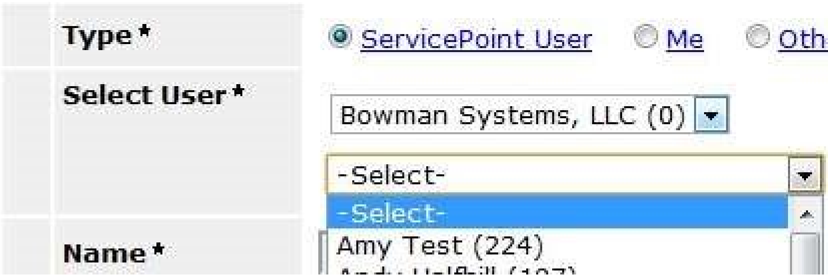


Figure 11

Another option is to select Me as the case manager, which populates the fields with the user’s information.

Figure 12

The final option is to select Other, giving the user the ability to track case managers who are or are not affiliated with agencies who use Community Services.

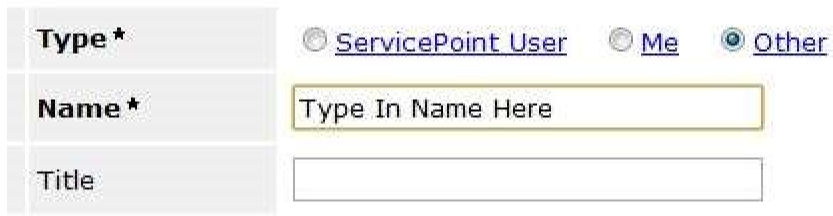


Figure 13

Other fields that can be completed are the case manager’s title, phone number, and email address. The provider (required field) will default to the user’s provider but can be changed to another provider to which the user has EDA access.

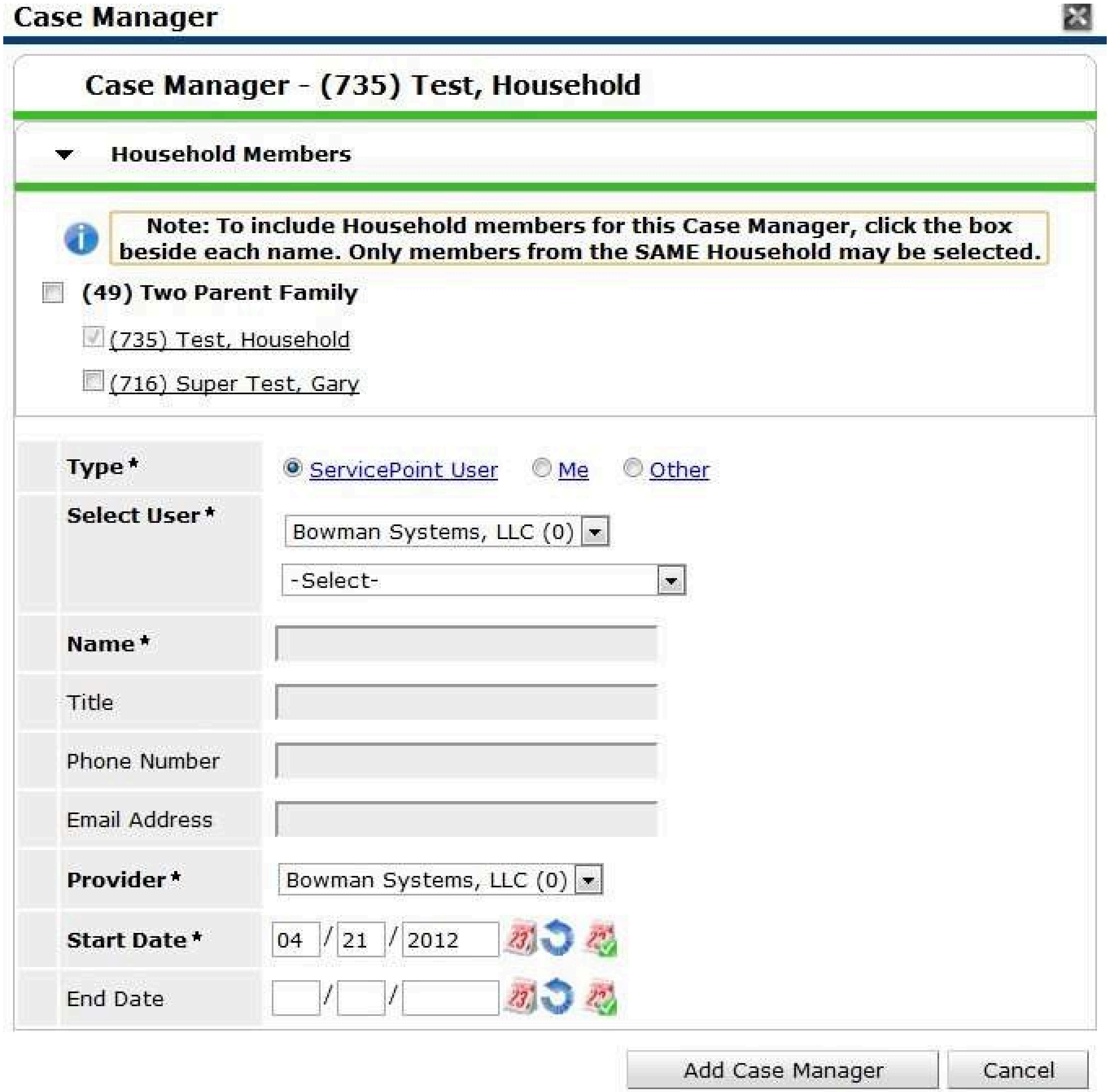

Case Manager
Case Manager - (735) Test, Household
Household Members
Note: To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.
(49) Two Parent Family
(735) Test, Household
(716) Super Test, Gary
Type *
ServicePoint User
Me
Other
Select User *
Bowman Systems, LLC (0)
-Select-
Name *
Title
Phone Number
Email Address
Provider *
Bowman Systems, LLC (0)
Start Date *
04 / 21 / 2012
End Date
Add Case Manager
Cancel

Figure 14

The Start Date is also a required field. The Start Date and End Date indicate the time frame the case manager is active for the client.

After the fields are completed, click Add Case Manager. After the case manager data has been saved, a history and a preview of case managers is displayed. To edit case manager information, click the Pencil icon. To delete the case manager record, click the Trash Can icon.


Case Managers

			Name	Provider	Phone Number	Start Date	End Date
			New User	Bowman Systems, LLC		04/21/2012	

Add Case Manager **Showing 1-1 of 1**

Figure 15

Case Plans

The next step in case management is to start developing a Case Plan. In this section, Goal Classification, Action Steps, Case Notes, and related Service Transactions can be added. To start the process, click the Case Plans tab and then click Add Goal.

Figure 16

In the pop-up window, select the household members associated with the goal. The provider defaults to the users' EDA provider. This can be changed by selecting a new provider from the Provider drop-down list.

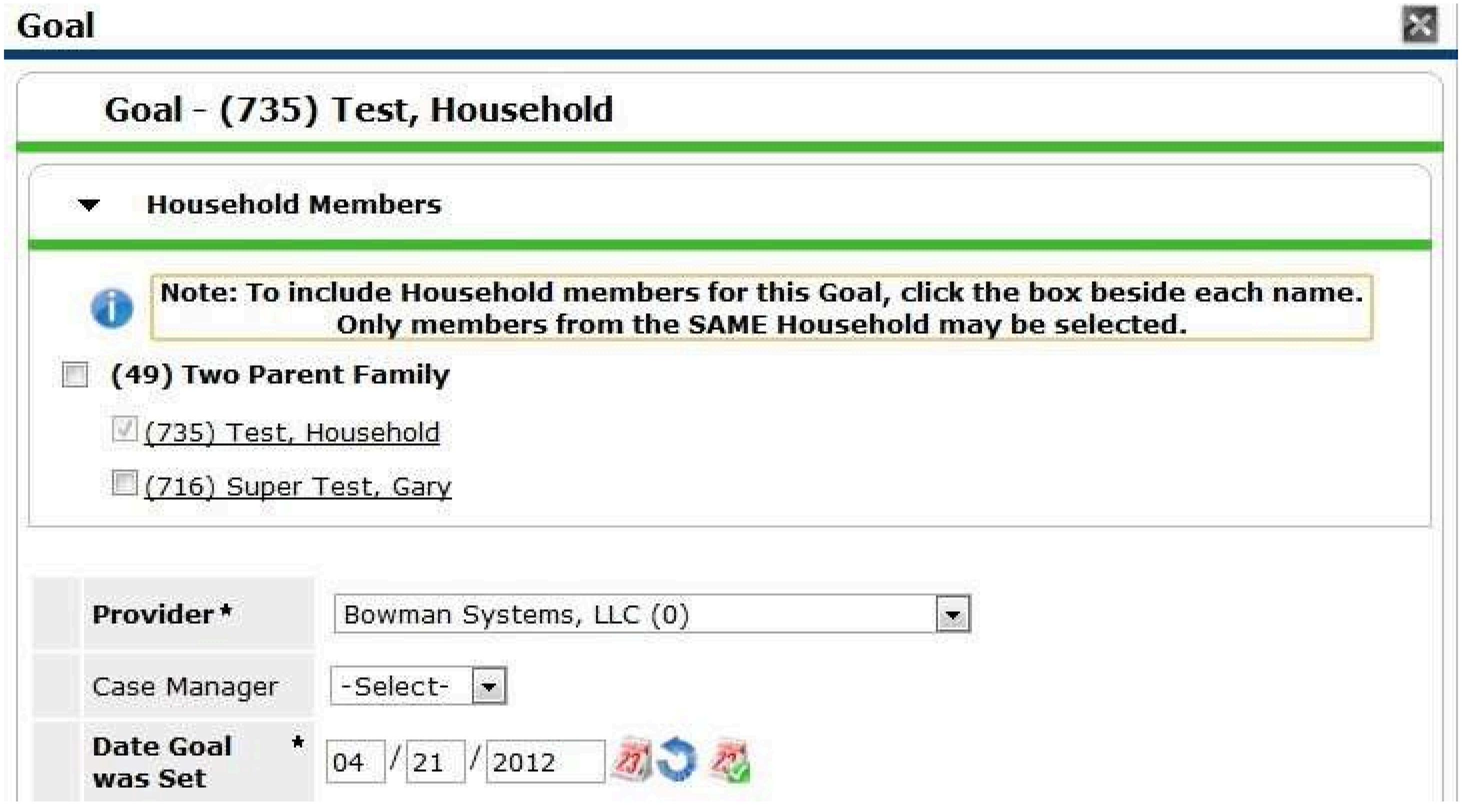


Figure 17

Select a Case Manager to assign to the goal from the Case Manager drop-down list. This list is populated from the Case Managers tab.

Figure 18

Next, enter the date the goal was set. This can be typed or selected from the calendar.

The next two questions are Goal Classification and Goal Type. The Goal Type drop-down is dependent on the selected category from the Goal Classification list. For example, one set of answers for Type is displayed by selecting the classification of Education, and another set of answers are displayed if the classification of Employment is selected.

Figure 19

Complete the Goal Description, if needed. This can be used to better explain the Goal Classification and Type with information the client wants with the goal.

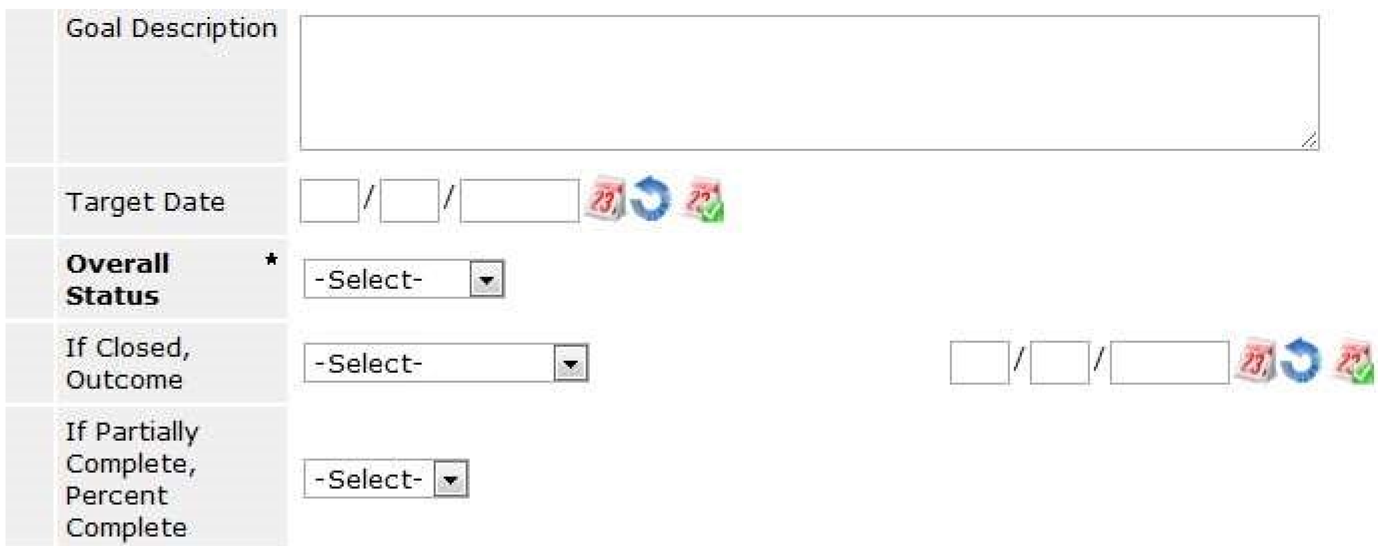


Figure 20

Add the Target Date by typing the date or selecting it from the calendar. This is the date that is targeted for the goal completion. Select the Overall Status of the goal, which is a required field. If the Overall Status is Closed, select an outcome. Finally, if the goal is partially completed, select the percentage complete from the If Partially Complete, Percent Complete drop-down list.

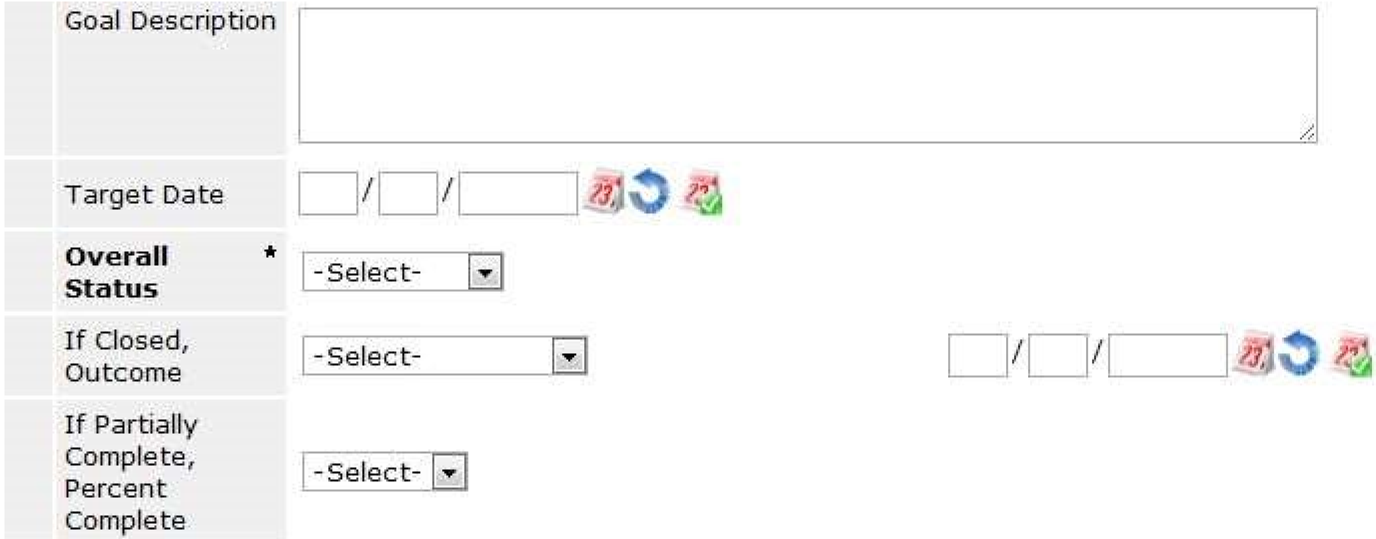


Figure 21

If needed, a follow up date can be entered to provide a reminder for users. To use this function, enter the Projected Follow Up Date. The Follow Up User can be selected from the drop-down list, or the user can change to another provider to which they have EDA access, to display more options.

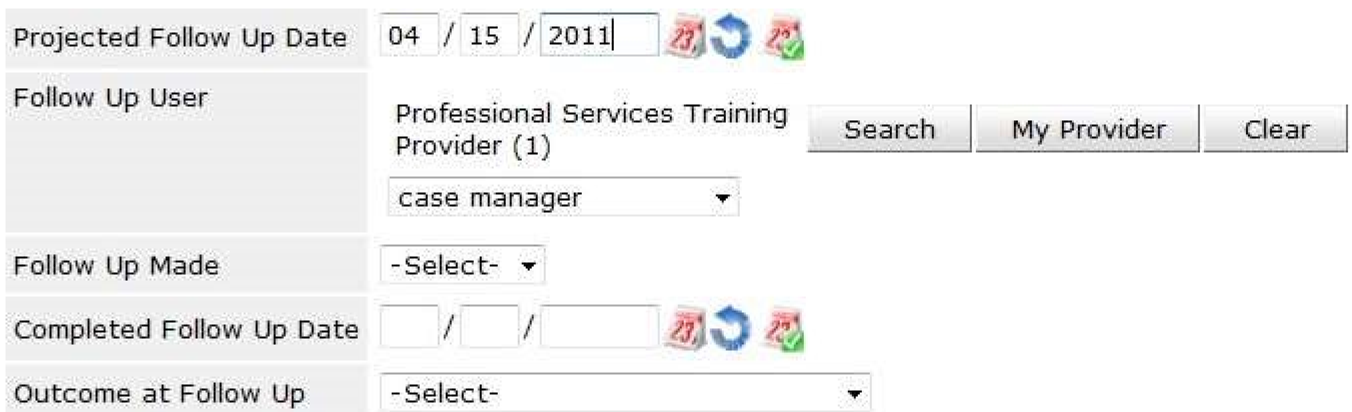


Figure 22

The last three fields in the follow up section are completed after the follow up has been made. This removes the follow up from the Follow Up List on your Home screen.

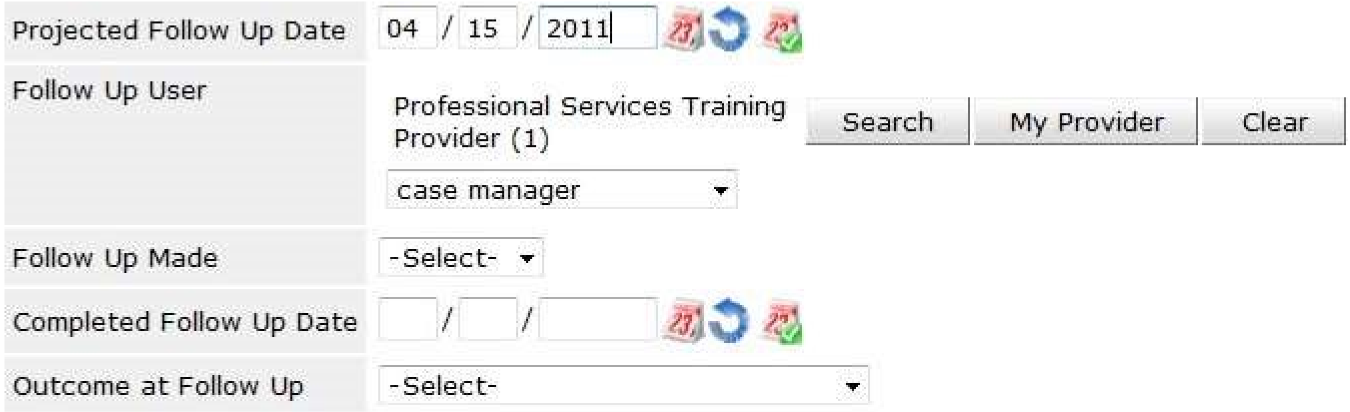


Figure 23

On the Home screen, or when the user logs into Community Services, the Follow Up List will be populated with items. Click the Client ID to go to the client record. Click the Goal link to go to the goal that requires follow up.

Follow Up List

Client ID	Type	Date	Time Remaining
1	Goal	04/15/2011	64 Days
2	Goal	04/15/2011	64 Days

Figure 24

Goal

Goal - (Test, Just A 2)

Household Members

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

Household #1 Members: Check All Household Members | Clear All

☑ ZZ000000001, Anonymous

Provider *	Professional Services Training Provider (1) — Search / My Provider / Clear
Case Manager	-Select-
Date Goal was Set *	02 / 01 / 2011
Classification *	Education
Type *	Get GED
Target Date	03 / 15 / 2011
Overall Status *	-Select-
If Closed, Outcome	-Select- / /
If Partially Complete, Percent Complete	50%
Projected Follow Up Date	04 / 15 / 2011
Follow Up User	Professional Services Training Provider (1) — Search / My Provider / Clear case manager
Follow Up Made	-Select-

Figure 25

The final step is to click Add Goal. This adds the goal and gives the user the ability to add Case Notes, Action Steps, and Services related to the goal.

Additional options for case planning are displayed after Add Goal is clicked.

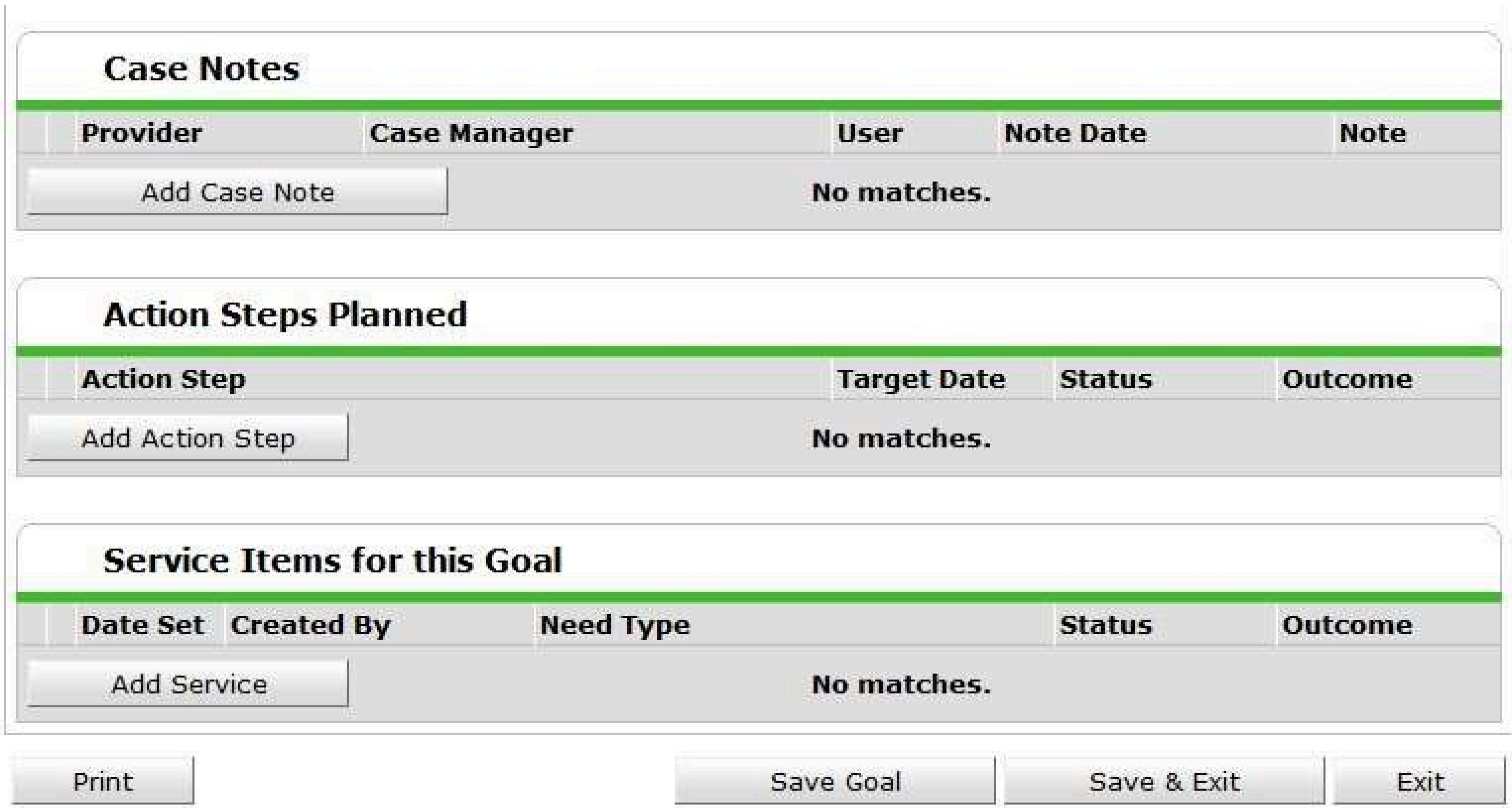


Figure 26

Add Case Notes

Add Case Notes allows case managers to document contacts and visits with clients during their time in case management. To add case notes, click Add Case Note.

{Figure 27 coming soon}

Select associated household members if needed, then select the case manager associated with the case note or select a different provider from the Provider list. After the provider is selected, assign the appropriate case manager from the Case Manager drop-down list.

Note: Depending on your implementation, you may or may not be able to edit or delete case notes after they are saved. Contact your system administrator for more information.

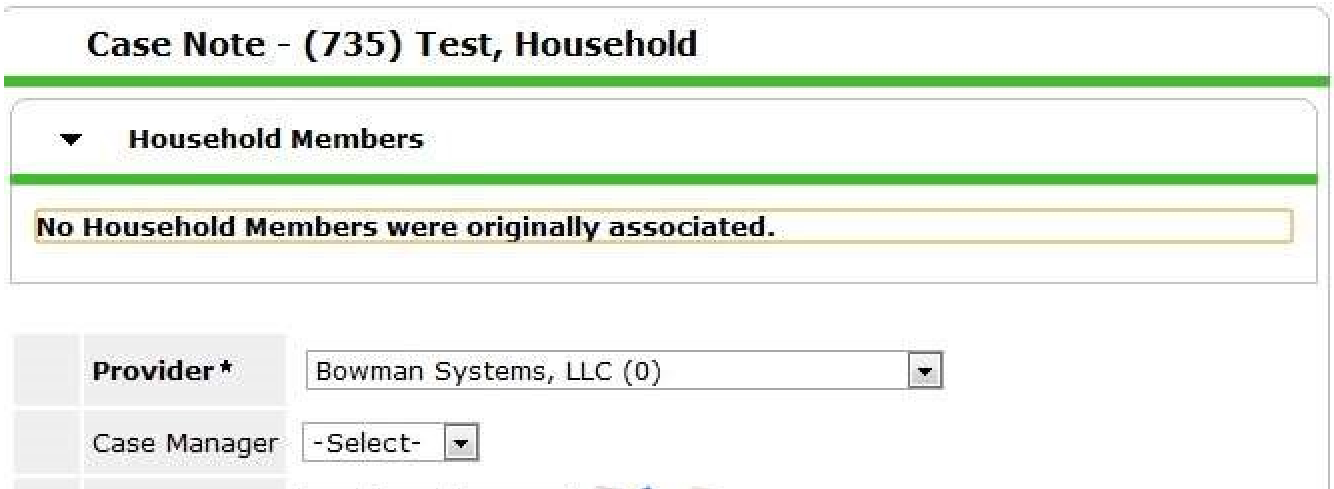


Figure 28

Type or select the Note Date. This date defaults to the current day and can be edited, if needed. Type the note or copy and paste it into the Note field. When finished, click Save Case Note.

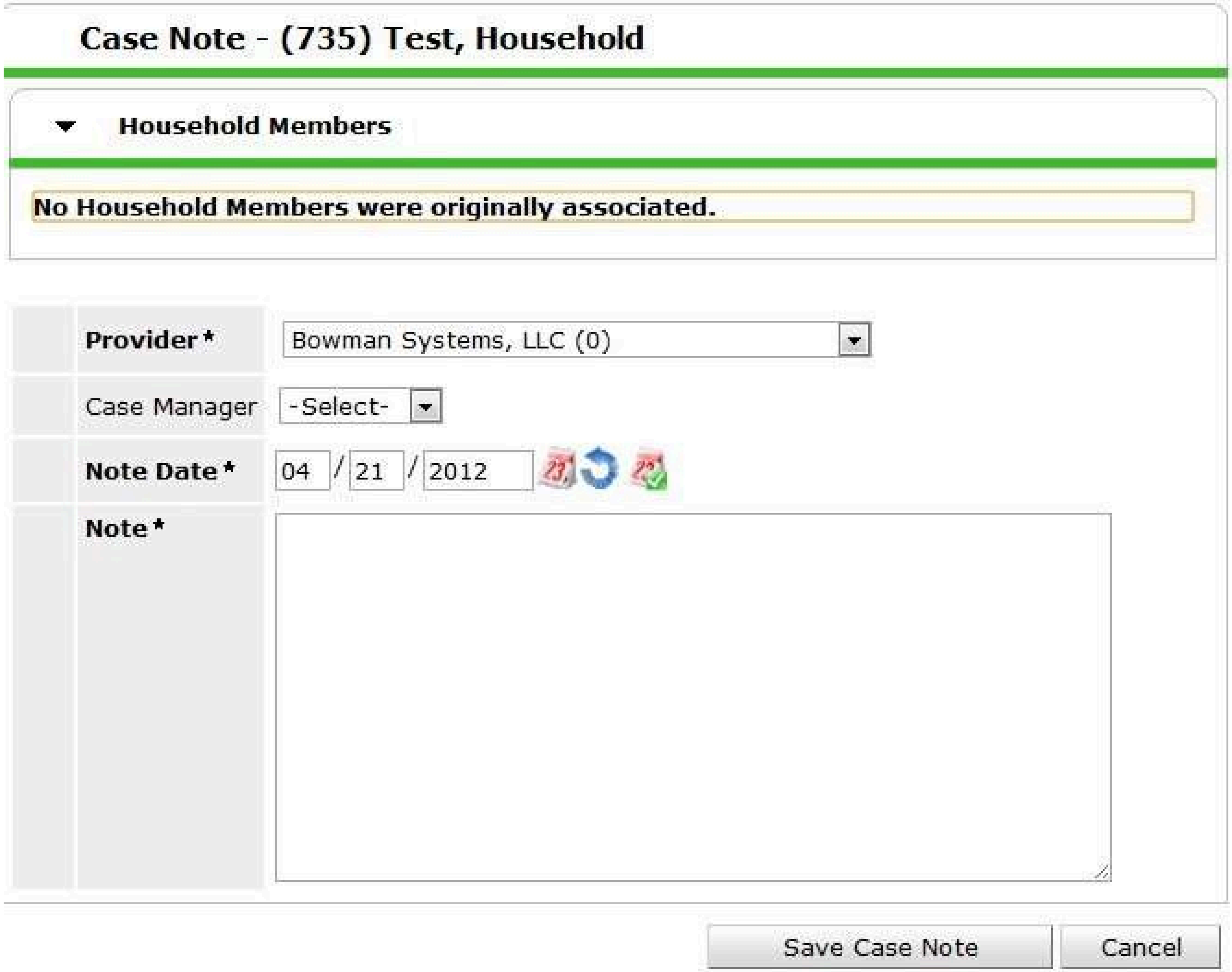


Figure 29

After the case note has been saved, a history and preview of case notes will be displayed.

1. To edit case notes, click the Pencil icon.
2. To delete case notes, click the Trash Can icon. This function may be disabled by your system administrator. If this is the case, a Magnifying Glass icon is displayed, and users can view case notes but cannot edit or delete them.

Goals

		Provider	Classification	Type	Target Date	Status	Notes	Latest Note Date	
		Bowman Systems, LLC	Educational	Obtain GED		Identified	1	04/21/2012	

Add Goal — **Showing 1-1 of 1**

Figure 30

3. The Notes column indicates the number of notes.
4. The Binder Clip icon allows you to attach a document to the note. To attach a document, click the Binder Clip icon.

Goals

		Provider	Classification	Type	Target Date	Status	Notes	Latest Note Date	
		Bowman Systems, LLC	Educational	Obtain GED		Identified	1	04/21/2012	

Add Goal — **Showing 1-1 of 1**

Figure 31

Click Add New File Attachment, then click Choose File. Navigate to the file you want to upload and add a description, as needed. Click Upload.

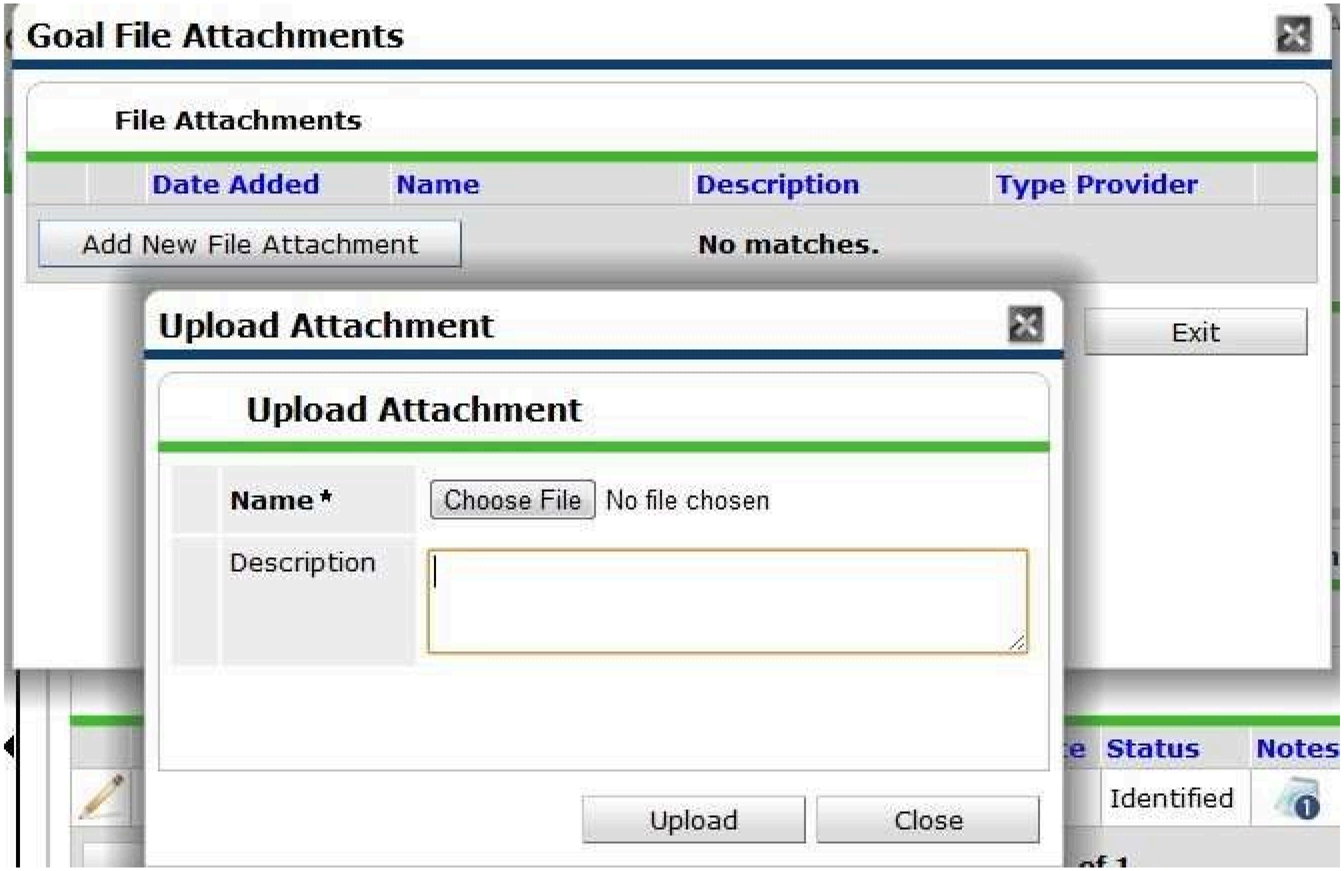


Figure 32

Note: Household members must be selected in the goal before adding Action Steps.

Action Steps

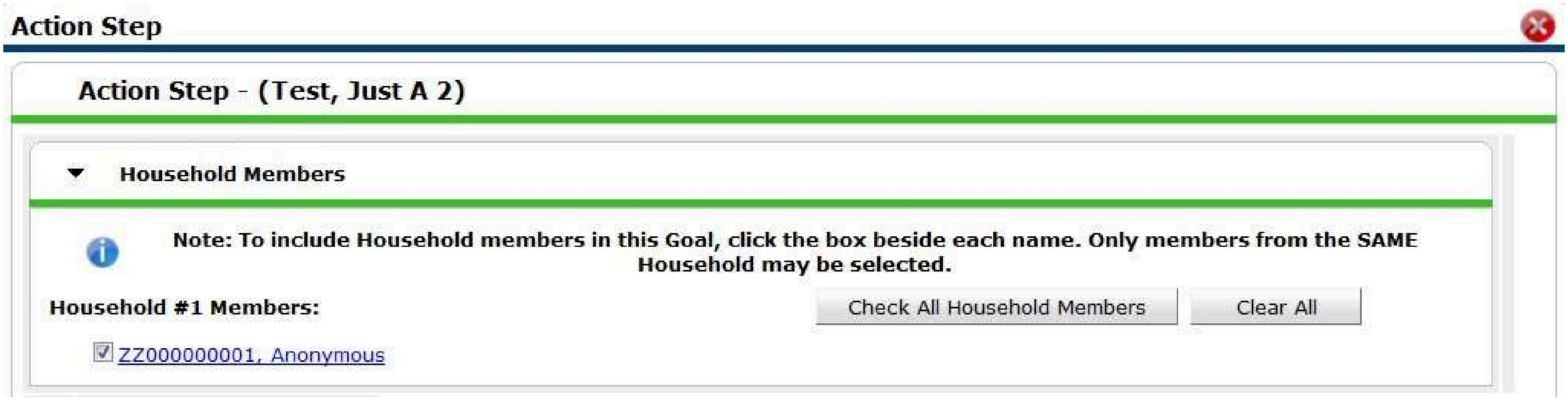


Figure 33

Action Steps can be added to document the steps the client must take to complete the overall goal. Click Add Action Step to use this feature.

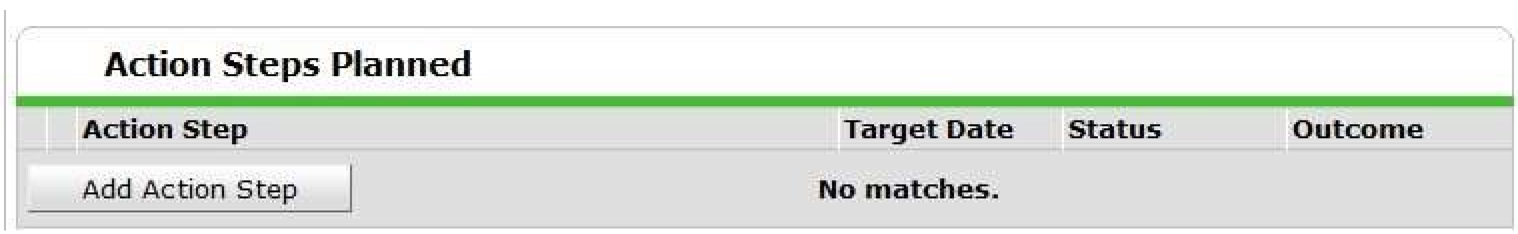


Figure 34

If additional household members were selected in the original goal, those members can be selected in the Action Step. If the Action Step is for specific members of the household or only for the client, clear the check boxes next to the additional household member names.

The remaining section of Action Steps is completed in the same way as a goal. The exception is the Action Step is not a drop-down list but a self-defined statement that must be entered by the user. Users will still select a provider, enter a date in the Date Action Step was set field, Target Date, and Overall Status. If the action step is closed, the outcome and date it was closed are added.

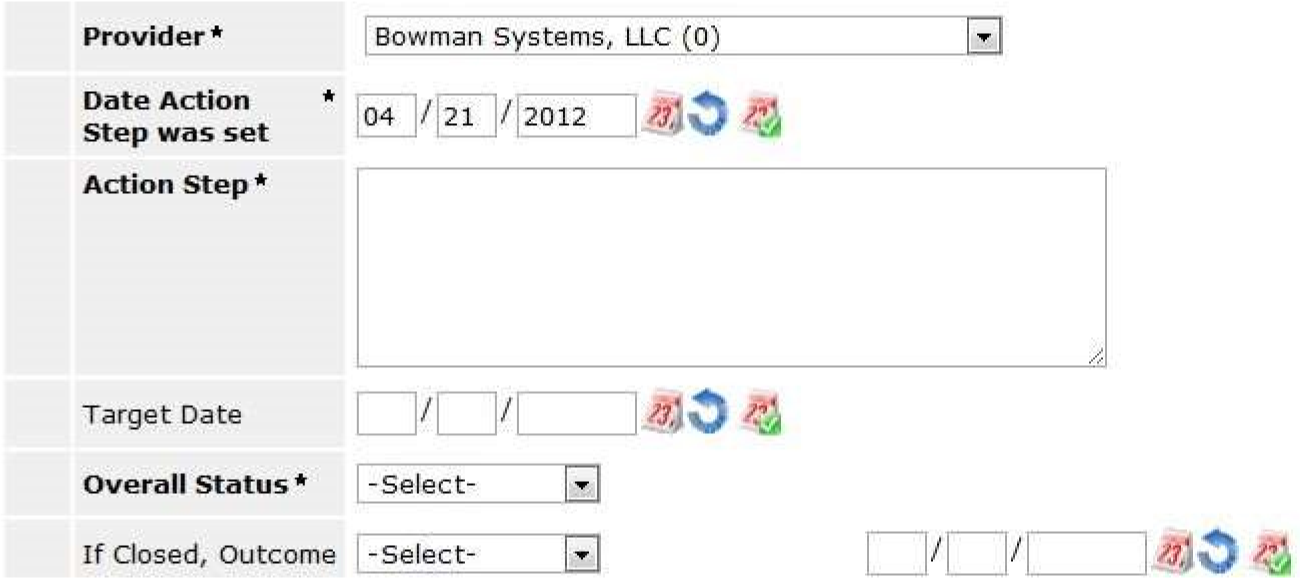


Figure 35

Follow ups can be made on Action Steps using the same process as the goal. After all data has been entered for the Action Step, click Save Action Step.

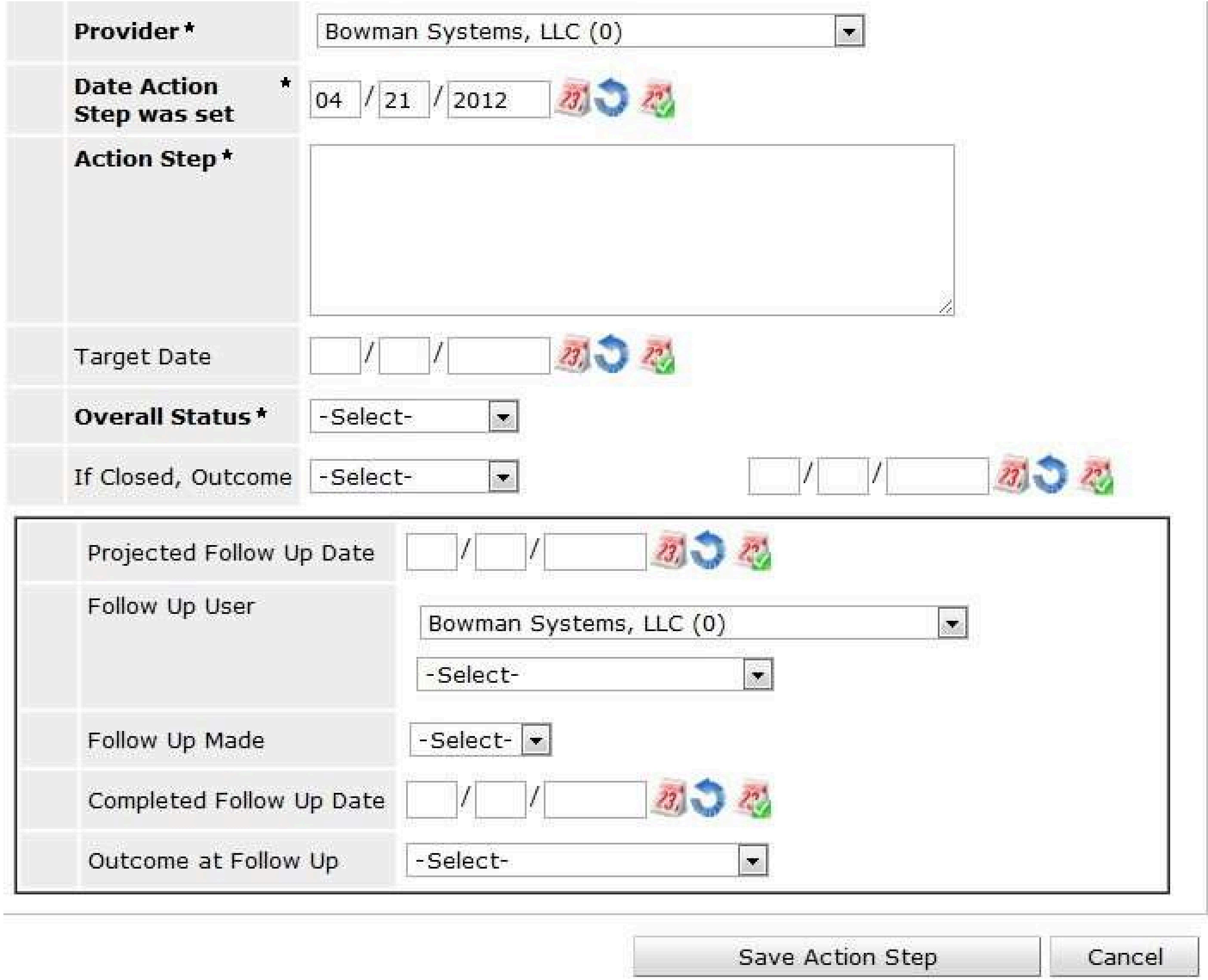


Figure 36

After the Action Step data has been saved, a history and preview of the Action Step is displayed.

1. Click the Pencil icon to edit the Action Step.
2. To delete an Action Step, click the red Universal No icon.

Action Steps Planned

		Action Step	Target Date	Status	Outcome
		This is an Action Step.	03/10/2011	In Progress	

Add Action Step   **Showing 1-1 of 1**

Figure 37

Service Transactions

As part of case management, services may be provided to help clients achieve their goals. To ensure services are included in reporting, in the Service Items for this Goal section, click Add Service.

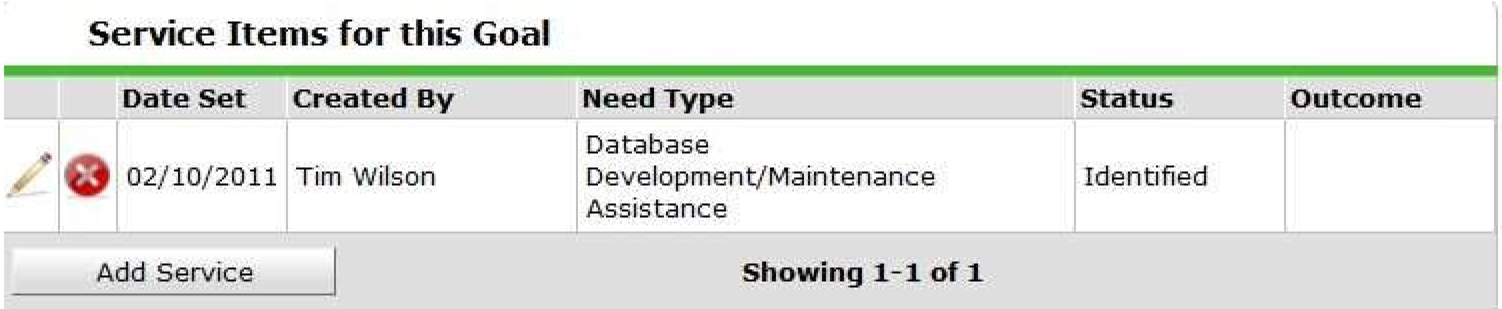
Figure 38

After clicking Add Service, the Service Transaction page is displayed. Follow the normal workflow and enter services as usual. Click the Client Information tab and then click the Case Plans tab.

Click the Pencil icon next to the goal you've just entered for the Service Transaction.

Figure 39

A history and a preview of service items for the goal are displayed. To edit service items, click the Pencil icon. To delete service items, click the red Universal No icon.



Service Items for this Goal

		Date Set	Created By	Need Type	Status	Outcome
		02/10/2011	Tim Wilson	Database Development/Maintenance Assistance	Identified	

Add Service

Showing 1-1 of 1

Figure 40

For Your Information

After service items are entered, you have completed all steps in the Case Plan process. When you’re finished, click Save Goal, Save & Exit, or Exit (will not save).

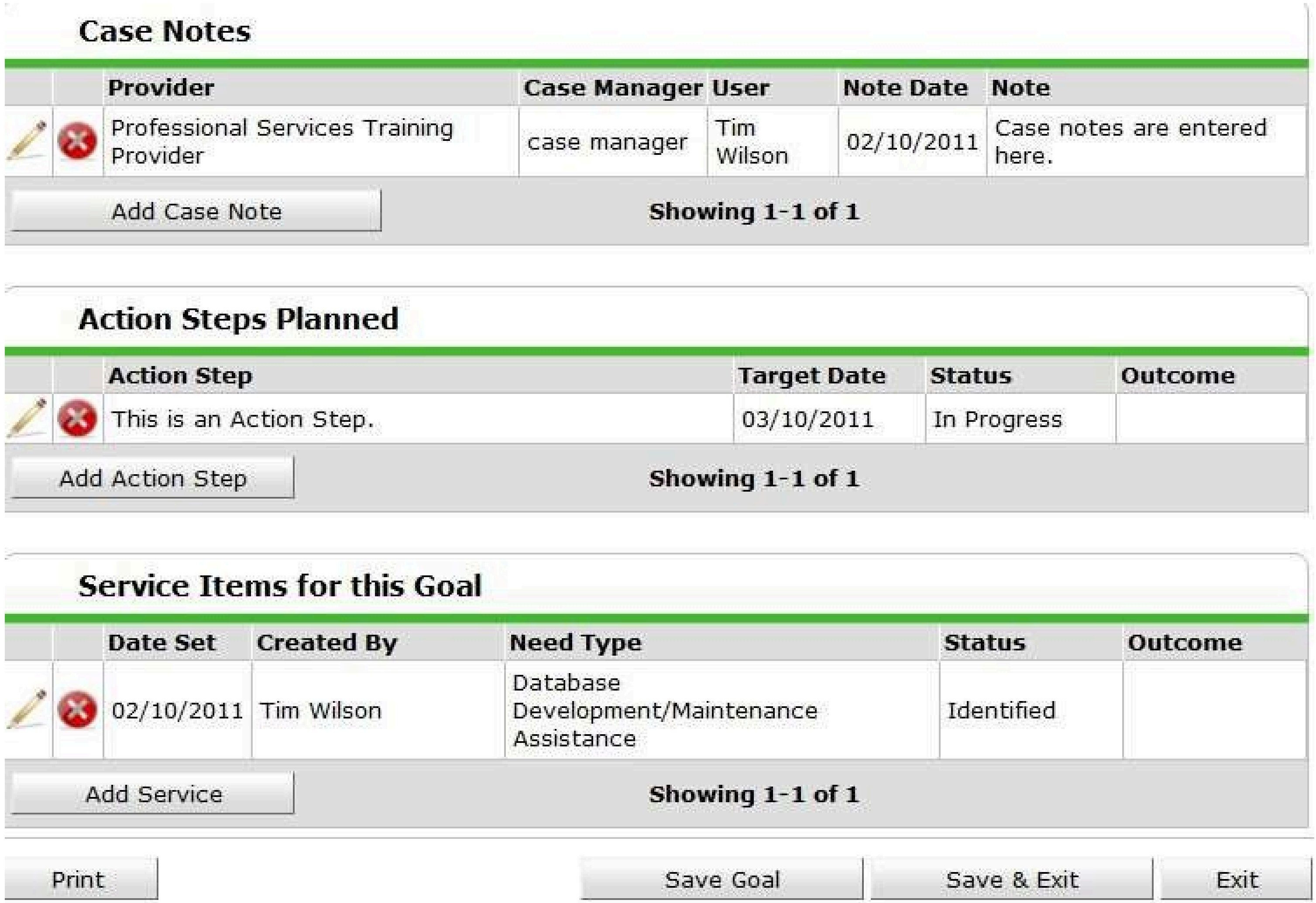


Figure 41

For Your Information

Adding goals can be repeated for additional goals that the client/household needs. To add to Action Steps, Case Notes, or Service Items for the goal, from the Case Plans tab, click the Pencil icon next to the Case Plan that needs updating.


Summary
Client Profile
Households
ROI
Entry / Exit
Case Managers
Case Plans
SSOM
Activities
Assessments
Goals
Classification
Date Set
Type
Date Added
User
Notes
Education
02/01/2011
Get GED
02/10/2011
Tim Wilson
(1)
Add Goal
Showing 1-1 of 1

Figure 42

Print Case Plans And Goal Details

Within the case management option, case managers can print case plans and goal details.

Goal details can be printed within the goal. If you are not currently in the goal, click the Pencil icon next to the goal for which you want to print details. Then click the Print button.

Figure 43

A print options screen is displayed. Select the options you want to be displayed on the printout.

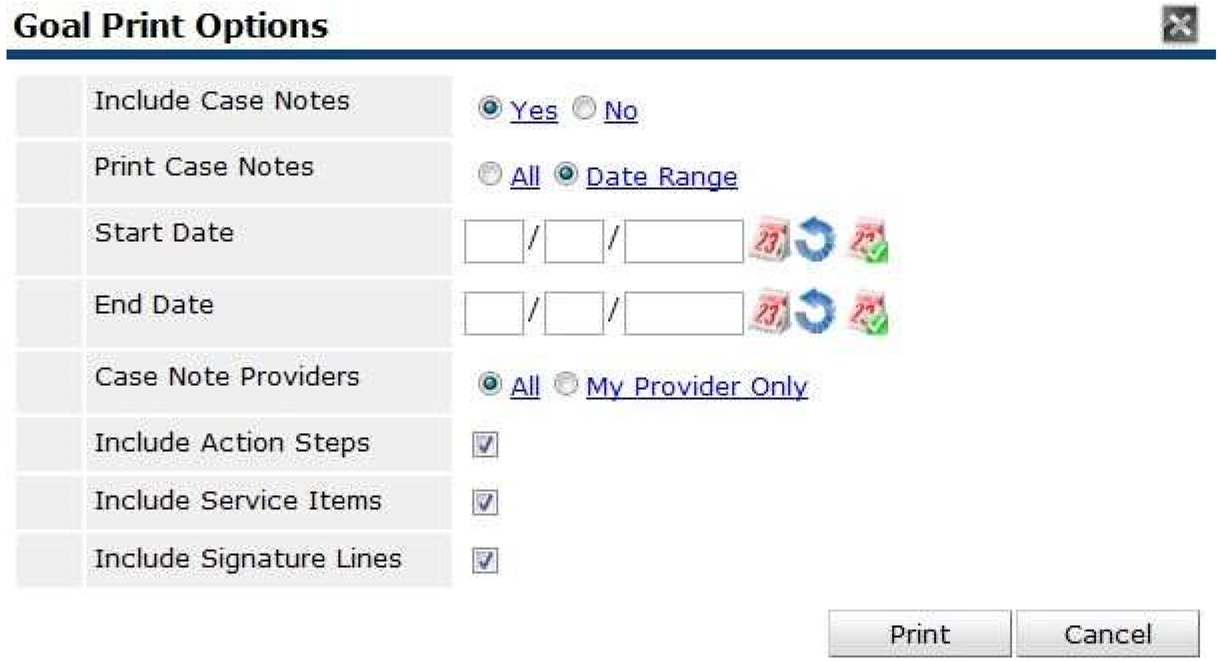


Figure 44

Print Case Notes is conditional on the response to the Include Case Note question. If Yes is selected, Print Case Notes is displayed. Select either All or a Date Range. If Date Range is selected, Start Date and End Date fields are displayed, and must be completed. Select either All Providers or My Provider Only.

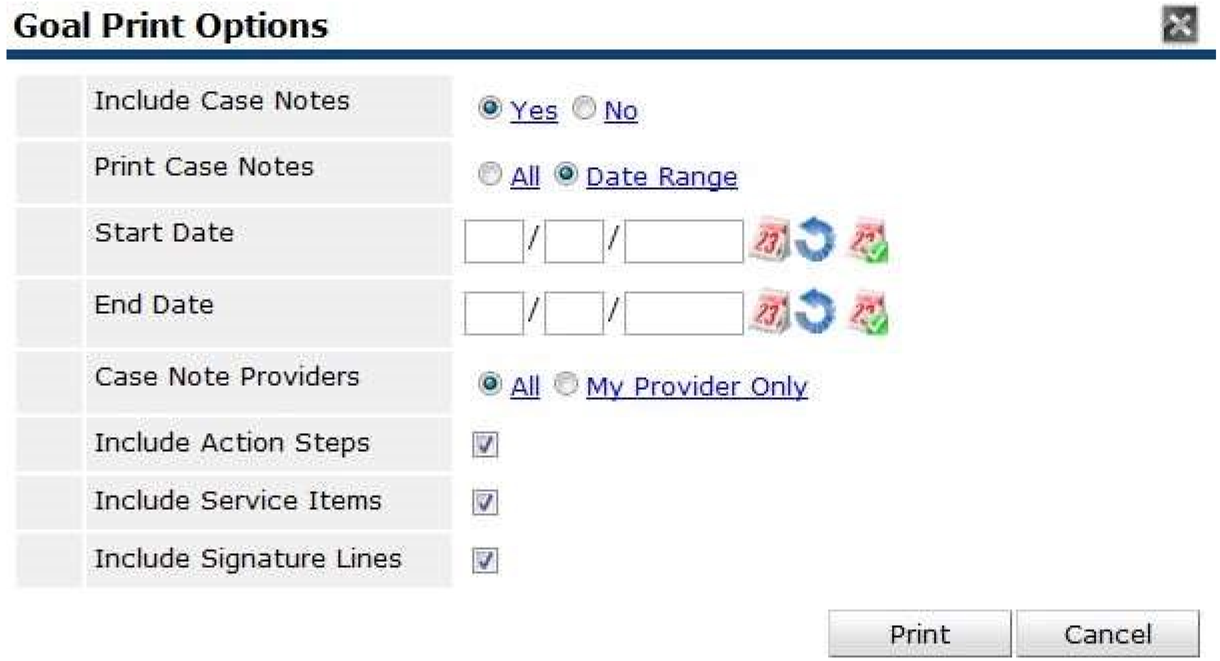


Figure 45

By selecting each option, users can print Action Steps, Service Items, and Signature lines. The signature lines option includes lines for both the case manager and the client to sign and date the form. When finished, click Print.

Figure 46

Case Plans are printed from the Case Plans tab. Click Print Case Plan to print it.

Figure 47

A print options screen is displayed. Select the options you want to be displayed on the printout.

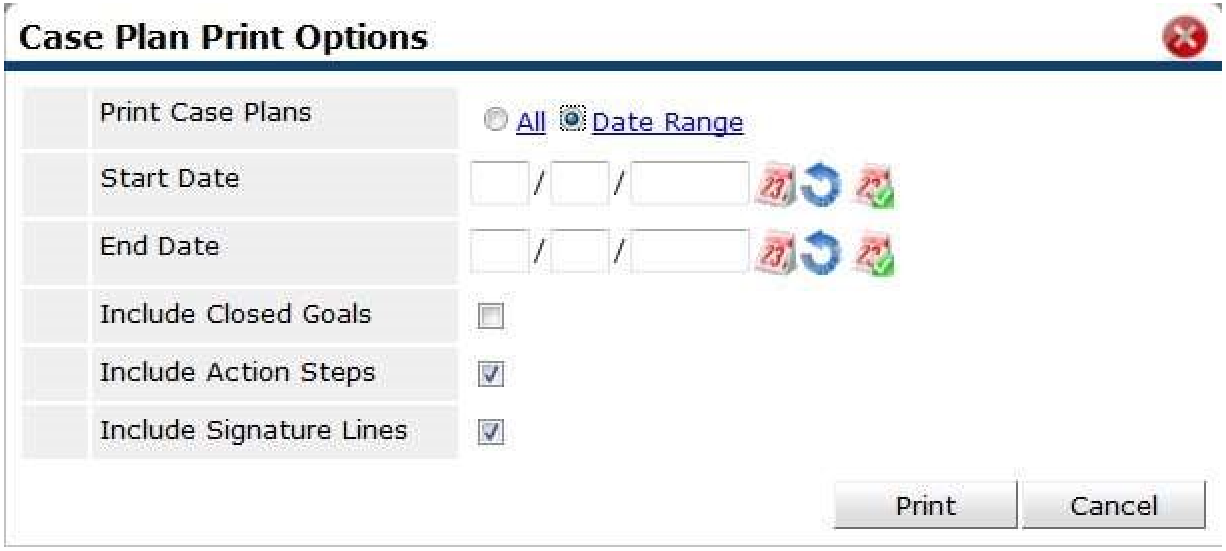


Figure 48

The case manager can specify if they want to print all Case Plans or just those within a specific date range. If the Date Range option is selected, a Start Date and End Date must be selected. The Start Date and End Date fields are not displayed if the user selects All.

The user can include Closed Goals, Action Steps, and Signature lines by selecting the relevant check boxes. The Include Signature Lines option includes lines for both the case manager and the client to sign and date the form. When finished, click Print.

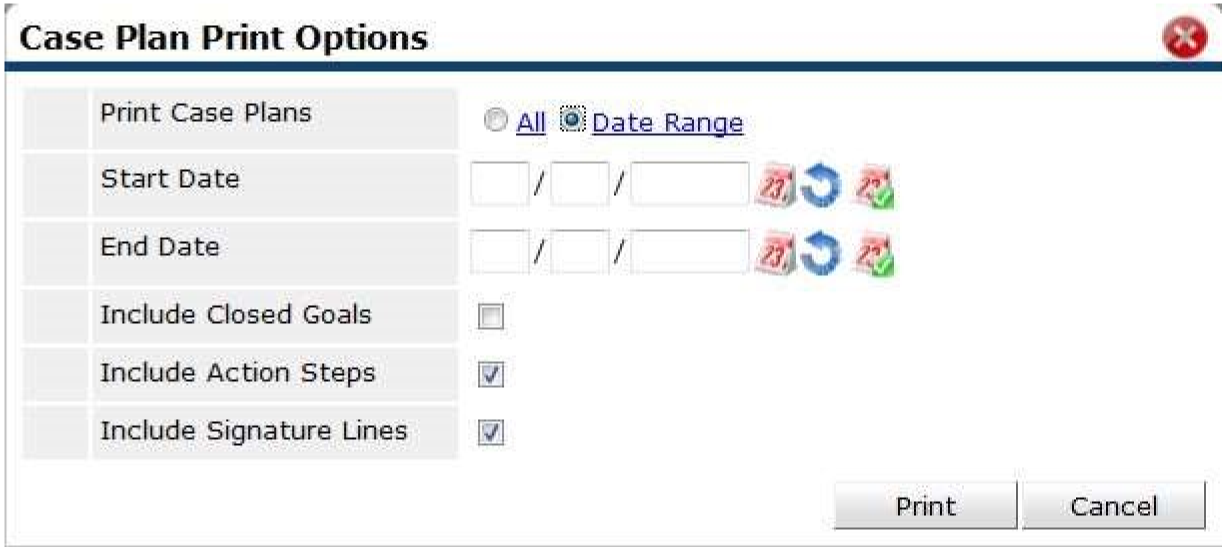

Case Plan Print Options
Print Case Plans
All
Date Range
Start Date
End Date
Include Closed Goals
Include Action Steps
Include Signature Lines
Print
Cancel

Figure 49

File Attachments

File attachments are used to attach supporting documents for case management or case notes that have been previously created. Files can be attached on the Client Profile tab or the Case Plan tab. On both tabs, File Attachments are displayed at the bottom of the page.

Figure 50

Figure 51

Once you’re on the Client Profile or Case Plans tab, scroll to the bottom of the screen. Click Add New File Attachment.

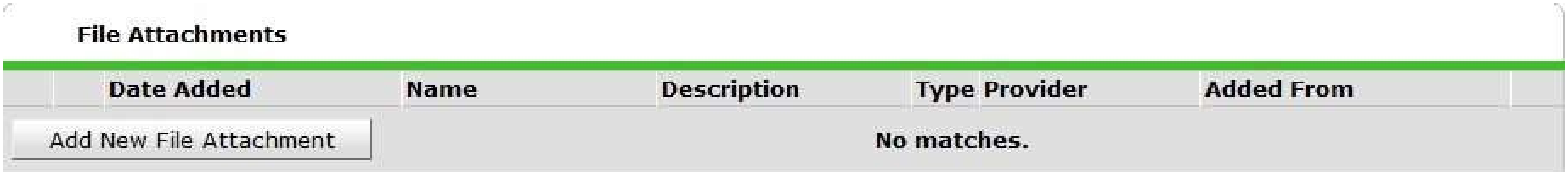


Figure 52

The Upload Attachment pop-up is displayed. Click Browse to search your computer for the file you need to upload. Optionally, enter a description of the file in the Description field. When finished, click Upload.

Figure 53

After the file has been uploaded, a history of all the files that have been uploaded is displayed. To view the file, click the Magnifying Glass icon. To delete the file, click the Trash Can icon. Security can be changed on the file by clicking the Padlock icon. The Added From column displays the location from which the file was attached (ROI, Entry/Exit, Case Goal, etc.).

File Attachments

		Date Added	Name	Description	Type	Provider	Added From	
		04/21/2012	ServicePoint 5.0 Rollout FAQs.pdf		pdf	Bowman Systems, LLC	Client Profile	

Add New File Attachment **Showing 1-1 of 1**

Figure 54