

CASE PLANS

1. In the Program Enrollment Summary Screen, click on [New Case Plan](#) button:

Enrollment
[Program Summary](#)
[Program Search](#)

Transactions
[HH Summary](#)
[Client Summary](#)

Status Assessments
[New/Update](#)
[View](#)

Program Enrollment Summary

Program Name: COMM SH-LC HTBA-LAN-LC HOME TBA
Enrollment Date: 03-20-2008

Client's name= Client Transaction Summary Screen
 Enrolled Date= Program Enrollment Edit Screen
 End Date= Program Exit Edit Screen
 Entrance and Exit Assessment= Assessment Edit Screen

Client	Program Enrolled Date	Program End Date	Entrance Assessment	Exit Assessment
DEPUTY DOG	03-20-2008	<input type="button" value="Exit"/>		
POLLY PUREBRED	03-20-2008	<input type="button" value="Exit"/>		

Case Plans

Case Plan Num= Case Plan View Screen

Case Plan Num	Status	Open Date	Close Date
<input type="button" value="New Case Plan"/>			

2. Complete the set up of the new case plan and [save](#).

Case Plan
[Search](#)

Case Plan New

APC: COMM SH-LC HTBA-LAN-LC HOME TBA
 Caseworker: LCHSLNS

Case Plan #: Leaving this blank will use auto-generated Case Plan #

Open Date: ie. MM-DD-YYYY *

Projected Close Date: ie. MM-DD-YYYY *

Clients

Clients (At least one client must be selected to create a new Case Plan) **Entry Date ***

<input checked="" type="checkbox"/>	DEPUTY DOG	<input type="text" value="03-20-2008"/>
<input checked="" type="checkbox"/>	POLLY PUREBRED	<input type="text" value="03-20-2008"/>

Caseworker(s)

Name (Agency)	Added Date *	Privilege *
<input checked="" type="checkbox"/> LYN OLIVER (LCHHS)	<input type="text" value="03-20-2008"/>	<input type="text" value="Normal"/>
<input type="checkbox"/> MARY BENNETT (LCHHS)	<input type="text"/>	<input type="text" value="Normal"/>

3. To document monthly meetings, click on the [View/Add Case Notes](#) button:

Case Plan View

Case Plan # 1388
 Open Date 03-20-2008
 Projected Close Date 03-31-2009
 Closed Date
 Case Plan Status OPEN

[Edit Case Plan](#)
[Close Case Plan](#)

Action Plan (s)		
Category	Title	Status
		Housing Situation <input type="button" value="Add"/>

Case Notes OPEN (0), PRIVATE (0)

4. Click on the [Add](#) button to add notes for each month.

Case Notes Summary

O/P	Owner	Date
No Available Case Notes For This Case Plan		

5. Type your notes and click [save](#).

Case Notes Summary

O/P	Owner	Date
OPEN	LISE STUART	03-21-2008

Household in HTBA unit as of yesterday. Met with Deputy dog this morning to help enroll in OR State I-Match job services site. Steady employment is primary goal. Helping client with Section 8 paperwork for mailing list.

You're done, but maybe you want to add an action plan to track...

6. On the left side of the screen, click on Case Plan [View](#). Under Action Plans, select the type of issue you are tracking and click on the [add](#) button:

Case Plan View

Case Plan # 1388
 Open Date 03-20-2008
 Projected Close Date 03-31-2009
 Closed Date
 Case Plan Status OPEN

[Edit Case Plan](#)
[Close Case Plan](#)

Action Plan (s)		
Category	Title	Status
		Housing Situation <input type="button" value="Add"/>

7. Complete the details and click the [Save](#) button

Case Plan
[Search](#)
[View](#)

CW Ticklers
[View](#)

Case Notes
[Summary](#)

Action Plan New

Goal Category Employment

Action Plan Title *

Entry Level *

Target Goal *

Open Date ie. MM/DD/YYYY *

Projected Close Date ie. MM/DD/YYYY *

Create Projected Completion Date Tickler

Add	Client*	Entry Date*	Last Assessment Level
<input checked="" type="checkbox"/>	DEPUTY DOG	<input type="text" value="03-21-2008"/>	Part time no benefits
<input type="checkbox"/>	POLLY PUREBRED	<input type="text"/>	Part time no benefits

8. Click on Case Plan [View](#) on the left side of the screen to review your case plan. You're done! Hover over Client in the top navigation bar and click on HH View to get back to the HH View Screen.

The next time you see the client for case management:

- go the HH View
- click on program enrollment name
- From Household Summary click on the program enrollment summary button
- Click on the case plan number- in this case it's 1388

Case Plan
[Search](#)
[View](#)
[Edit](#)
[Close](#)
[Add PE](#)
[Add Client](#)
[Add CW](#)

CW Ticklers
[View](#)

Case Notes
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Enrollment
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[HH Summary](#)
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Status Assessments
[New/Update](#)
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Program Enrollment Summary

Program Name: COMM SH-LC HTBA-LAN-LC HOME TBA

Enrollment Date: 03-20-2008

Client's name= Client Transaction Summary Screen
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End Date= Program Exit Edit Screen
Entrance and Exit Assessment= Assessment Edit Screen

Client	Program Enrolled Date	Program End Date	Entrance Assessment	Exit Assessment
DEPUTY DOG	03-20-2008	<input type="button" value="Exit"/>		
POLLY PUREBRED	03-20-2008	<input type="button" value="Exit"/>		

Case Plans

Case Plan Num= Case Plan View Screen

Case Plan Num	Status	Open Date	Close Date
1388	OPEN	03-20-2008	

- Click on View/Add Case Notes

Case Plan
[Search](#)
[View](#)
[Edit](#)
[Close](#)
[Add PE](#)
[Add Client](#)
[Add CW](#)

CW Ticklers
[View](#)

Case Notes
[Summary](#)

Case Plan View

Case Plan # 1388

Open Date 03-20-2008

Projected Close Date 03-31-2009

Closed Date

Case Plan Status OPEN

Action Plan (s)		
Category	Title	Status
Employment	JOB SERVICES ASSISTANCE	OPEN
	Housing Situation	<input type="button" value="Add"/>

Case Notes OPEN (1), PRIVATE (0)

- Click on View/Add Case Notes then click on the add button.

Case Plan
[Search](#)
[View](#)

Action Plan
[View](#)

CW Ticklers
[View](#)

Case Notes
[Summary](#)
[New](#)

Case Notes Summary

O/P	Owner	Date
OPEN	LISE STUART	03-21-2008

Household in HTBA unit as of yesterday. Met with Deputy dog this morning to help enroll in OR State I-Match job services site. Steady employment is primary goal. Helping client with Section 8 paperwork for mailing list.

- Type notes and save

Case Plan
[Search](#)
[View](#)

Action Plan
[View](#)

CW Ticklers
[View](#)

Case Notes
[Summary](#)
[New](#)

Case Notes Summary

O/P	Owner	Date
OPEN	LISE STUART	03-21-2008
More notes on this household...		
OPEN	LISE STUART	03-21-2008

Household in HTBA unit as of yesterday. Met with Deputy dog this morning to help enroll in OR State I-Match job services site. Steady employment is primary goal. Helping client with Section 8 paperwork for mailing list.

For the next quarterly status assessment:

- go the HH View
- click on program enrollment name
- From Household Summary click on Status Assessments New/Update in the left column
- Complete the new assessment and print for your records if required.