Case Plans

THP Programs Only

Basic Steps: Adding a Goal

- Go to Case Plans tab and click "Add Goal"
- Complete the "Household Members" section
- Complete the "Goal Data" section and save changes

Basic Steps: Follow-up

- Retrieve client's goal information
  - Use list of outstanding goals on the home page or go to client's record and click on Case Plans tab
- Complete follow-up information
  - Update status, actual follow-up date, follow-up made, and outcome at follow-up fields

Reminders

- Date goal was set = program exit date
- Case plan provider must match the entry/exit provider
- Target and projected follow-up dates = 6 months after exit date
- Attempting to contact a client counts as a follow-up, even if actual contact is not made
- To enter general notes not specific to a goal, use "Notes About Client" in the summary tab or the assessments section