

Tracking HYA YSH Follow-Ups Using Goals

HYA YSH projects are now required to track follow-up information for youth at 6 and 24 months after exit using goals, which are located on the case plans tab in HMIS. Case plans allow you to set a housing goal for your clients at exit and track their progress after they have left your project.

A. Enter Case Plans

1. Make sure that you have ended all services and completed exit information and also in correct EDA.
2. From the head of household's record, click on the "Case Plans" tab.
3. Click **Add Goal**. The Goal pop-up window will open.
4. Select the head of household ONLY
5. Complete case plan information:
 - Provider: Must match the client's entry/exit provider!
 - Case Manager: Optional
 - Date Goal was Set: Must match the client's project exit date!
 - **For 6 Month Follow Ups:**
 - Goal classification: select "HYA YSH 6 Month Goal"
 - Type: select "YSH 6 Month Housing Goal"
 - Goal description: optional
 - Target date: enter a date 6 months after the exit date (date goal was set)
 - **For 24 Month Follow Ups:**
 - Goal classification: select "HYA YSH 24 Month Goal"
 - Type: select "YSH 24 Month Housing Goal"
 - Goal description: optional
 - Target date: enter a date 24 months after the exit date (date goal was set)
 - **NOTE: If you are creating this goal for a follow-up that has already been completed (i.e., if you are catching up on old data entry), SKIP to Step 3 on the following page.**
 - Overall status: select either "Identified" or "In Progress" from the list
 - There are no meaningful differences between the two in reports
 - If "Closed," Outcome: leave blank
 - If Partially Complete, Percent Complete: leave blank
 - Projected Follow-up date: enter the target date or a date of your choosing, if you wish to follow-up with the client sooner to make sure they are on track to meet their goal by the target date
 - The days remaining until your client's follow-up date will appear on the main screen whenever you log into ServicePoint
 - Follow Up User: Use this field to determine among the HMIS users at your agency whose home screen the follow-up reminder will appear on
 - Remaining questions: leave blank
6. Click **Add Goal**.
7. Click **Save and Exit**.

B. Follow-Up

Follow up on clients' case plans 6 and 24 months after they leave the project.

1. Log in to ServicePoint and EDA to the correct provider.
2. Retrieve your client's goal information:
 - On the Home Page Dashboard, locate the follow-up list section.
 - Click the client ID to go to the client's record, or click the blue "goal" text to go directly to the client's goal.
 - OR, look up your client's name or ID number in the system and click on the "Case Plans" tab. Click the pencil to the left of the goal to edit the information.
3. Complete the following follow-up information:
 - Overall Status: change to "closed"
 - If "Closed," Outcome: select outcome.
 - Date: enter date closed.
 - If partially complete, percent complete: select percentage completed.
 - Completed follow-up date: enter the 6 or 24 month follow-up date according to the type of follow up
 - Follow-up made: select "Yes" or "No"
 - Select "Yes" even if you attempted to contact the client, but were not able to make contact
 - If Follow-up made = "Yes," then
 - Completed Follow-up date: enter the 6 or 24 month follow-up date according to the type of follow up
 - Outcome at Follow-Up: select "Achieved," "Not Achieved," or "Unknown – unable to contact"
 - If Follow-up made = "No," then
 - Completed Follow-up date: DO NOT complete
 - Outcome at Follow-up: DO NOT complete
 - Case Notes, Action Steps, Service Items: Optional
4. Click Add Goal (NOTE: You will only see this if you skipped to Step 3 from the previous page.)
5. Click Save & Exit