

Compass – Best Practices for Action Plans

Service Provider Guide

Purpose: Use this guide when a Job Seeker has an existing Action Plan with another Service Provider, or when services and follow-up are ready to be completed in Compass.

1. Existing open Action Plan with another Service Provider

STOP: DO NOT add any new Action Plan Activities.

- Review the dates and comments associated with the existing Action Plan.
- Discuss with the Job Seeker why they are requesting a change in Service Provider.
- Contact your Contract Procurement Specialist (CPS) to determine how to proceed.

2. Dormant Action Plan: No Job Seeker contact for 90 days

Step	Action	What to do
1	Contact the Service Provider	<ul style="list-style-type: none">• Use a Compass tag, email, or phone. Ask the Service Provider to archive the Action Plan.
2	Wait for the archive	<ul style="list-style-type: none">• Do not open the new Action Plan until the existing Action Plan has been archived.
3	Request support if needed	<ul style="list-style-type: none">• Contact your CPS if support is required.

3. Completing services and follow-up

When	Click in Compass	Result
All Action Plan Activities are complete	Complete Services	Triggers Follow Up
At program exit, after all Follow Up activities are complete	Archive	Closes the Action Plan

Decision Check ✓

Is there an open Action Plan with another Service Provider?	<ul style="list-style-type: none">• Do not add activities. Review the record and contact CPS.
Has there been no Job Seeker contact for 90 days?	<ul style="list-style-type: none">• Ask the current Service Provider to archive.
Are all Action Plan Activities complete?	<ul style="list-style-type: none">• Select Complete Services.
Are all Follow Up activities complete at program exit?	<ul style="list-style-type: none">• Select Archive.