



Procedure to Close a Case Plan

1. Select small “Case Plan” Tab below the large “Client Information” Tab.

Release of Information: Ends 01/01/2020

Client Information				Service Transactions			
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessm

2. To update the goal that was set for the client by your program. Click edit pencil.

Goals						
	Classification	Type	Target Date	Status	Outcome	Provider
						Notes Latest
	Housing	Housing		In Progress		RI Coalition Data Standards Training Site
Add Goal						
Showing 1-1 of 1						

3. Choose items from drop down for the “Overall Status” to mark it “Closed” or “Abandoned,” if Closed, what was the Outcome? The date and percent complete are optional.

Target Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Overall Status *	<input type="button" value="Closed"/>
If Closed, Outcome	<input type="button" value="Partially achieved"/> <input type="text"/> / <input type="text"/> / <input type="text"/>
If Partially Complete, Percent Complete	<input type="text"/> 50%

4. Close any open Action Steps (if necessary) using the same procedure.

Date Action Step was set *	<input type="text"/> / <input type="text"/> / <input type="text"/> 2019
Action Step *	Get ID Cards
Target Date	<input type="text"/> / <input type="text"/> / <input type="text"/> 2019
Overall Status *	<input type="button" value="Closed"/>
If Closed, Outcome	<input type="button" value="Achieved"/> <input type="text"/> / <input type="text"/> / <input type="text"/> 2019

5. Click “Save and Exit at bottom of page.

Date Set	Created By	Need Type	Need Status	Outcome of Need
			No matches.	
Add Service		Add Multiple Services		
Print		Save Goal	Save & Exit	Exit