

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 *	Closed ▼	
If Closed, Outcome	Partially achieved ▼	01 / 18 / 2019
If Partially Complete, Percent Complete	50% ▼	

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

Date Action Step was set *	01 / 18 / 2019
Action Step *	Get ID Cards
Target Date	01 / 10 / 2019
Overall Status *	Closed ▼
If Closed, Outcome	Achieved ▼ 01 / 10 / 2019

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

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