

Record Case Plan

The Case Plan page provides a method for Case Managers to setup an overall case plan for an individual or a family. If you select a Program Component on this page, it will automatically create it if it does not already exist. Milestones may also be selected based on the Program Component the Client has been entered into.

The screenshot displays the HMIS Case Plan page for a client named Fred Flintstone. The page is divided into three main sections: Current Situation, Task or Action, and Outcome. Each section has a 'New', 'Save', and 'Delete' button. The Current Situation section shows a current situation of 'homeless', an immediate goal of 'temporary housing', and a long-term goal of 'permanent affordable housing'. The Task or Action section shows a task of 'Benefits' scheduled for '08/07/2008'. The Outcome section shows an outcome of 'Income' with a milestone of 'AS1HMIS-Comp1-M1-08' and a date of '08/08/2008'. A red arrow points from the 'Case Plan' link in the left-hand navigation menu to the 'Current Situation' section.

Current Situation {1 of 1}	
Current Situation	Immediate Goal
homeless	temporary housing

Task or Action {1 of 1}		
What/Where	When	Who
Benefits	8/7/2008 12:00:00	cli

Outcome {1 of 1}	
Outcome	Milestone
Income	AS1HMIS-Comp1

Navigating the Case Plan Page

- Current Situation records are displayed in the top section
- Task or Action records are displayed in the middle section
- Outcome records are displayed in the bottom section

Describe Client or Family problem

- 1 Click NEW button in top section
- 1 Enter Current Situation, Immediate Goal and Long Term Goal
- 2 Select Visit Date
- 3 Select Staff
- 4 Click SAVE in top section
 - a Use DELETE to remove unwanted Situation

Create Task or Action for Client

- 1 A record will be active if the Problem above was just created, otherwise, click NEW to create new record
- 2 Select What/Where
- 3 Select Date
- 4 Select Who
- 5 Select Program Component
 - a If Program Component has not been generated on Service Provider page, this will automatically create it there
- 6 Enter Comments
- 7 Click SAVE
 - a Use DELETE to remove unwanted Task or Action

Create Outcome

- 1 A record will be active if the Problem above was just created, otherwise, click NEW to create new record
- 2 Select Outcome
- 3 Select Milestone
- 4 Select Date
- 5 Enter Comments
- 6 Click SAVE
 - a Use DELETE to remove unwanted Outcome