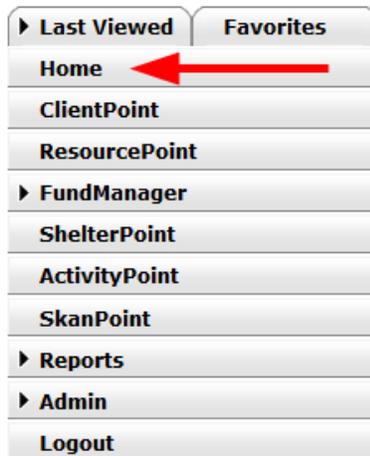


How to Make Follow-up Notifications for Yourself (or other staff) in ServicePoint

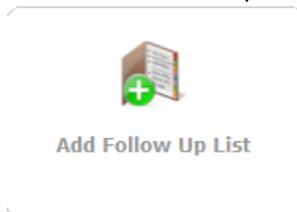
1.) Set up Follow Ups on your Home Screen



Open the Customize Homeless Page Dashboard



Select Add Follow Up List



Now the Follow-Up List appears on your Home screen:

Follow Up List (0)			
Client ID	Type	Date	Time Remaining

2.) How to Create a Follow-up Reminder

Go to the client Record in ClientPoint

Click on Case Plans



Click Add a Goal



Goal - (XXXXXXXX) Current, New

Household Members

To include Household members for this Goal, click the box beside each name. Only members from the SAME Household may be selected.

(1 XXXXXXX) Single Individual

(XXXXXXXX) Current, New

Provider* SVDP - OHCS - ESG 2014&2015 - RRH for SINGLES (4656) Search My Provider Clear

Case Manager -Select-

Date Goal was Set* 04 / 06 / 2016 Today's date

Classification* Housing What are you tracking?

Type* Maintain housing stability

Goal Description Create a 6 month follow-up assessment in the Entry/exit for this household. Make yourself a note

Target Date / / When do you need the Follow-up?

Overall Status* Identified Select "Identified"

If Closed, Outcome -Select- / / Last Step

If Partially Complete, Percent Complete -Select-

Projected Follow Up Date 10 / 06 / 2016 When do you need the Follow-up?

Follow Up User St. Vincent De Paul of Lane County (3234) Search My Provider Clear

Carmen Peer Add the person who does the followup

Follow Up Made -Select-

Completed Follow Up Date / / Last Step

Outcome at Follow Up -Select-

Add Goal Cancel

Print Save Goal Save & Exit Exit

Now Your Follow Up shows in your (or other User's) List

Follow Up List (2)			
Client ID	Type	Date	Time Remaining
285821	Goal	03/30/2015	Past
269656	Goal	10/06/2016	183 Days