



# Multiple Group Linkages on Service Plans

## AWARDS QUICK REFERENCE GUIDE

This feature gives the user the ability to link each objective/method on a plan to multiple groups within AWARDS. Specifically, the user can select from the list of groups in which a client is enrolled. This optional feature was developed for the PROS Working Group, but it can be turned on for any program group. If you do not have the ability to link multiple groups to your service plans and you are interested in having it turned on, please contact your Foothold Client Services representative or the Help Desk.

### WORKING WITH MULTIPLE GROUP LINKAGES ON THE INITIAL PLAN

To link an objective/method with multiple groups, complete the following steps:

1. From the AWARDS *Opening Menu* page, navigate to the client's *Individual Service Plan Index* page by clicking **Services** > selecting the **Program**, and clicking **Service Plans** > selecting the **Client**, and clicking **CONTINUE**.
2. In most cases, a Service Plan will have been automatically scheduled for the client during the intake/admission process or after working on the client's admission note. If a Service Plan is scheduled, click the **Selected** radio button next to it and then click **CONTINUE** to open the plan's cover sheet. Otherwise, click **Update Schedule** and add one to the client's schedule and then select it.
3. Enter or edit data on the Service Plan cover sheet, and click **UPDATE & CONTINUE**. The *Service Plan Goals, Objectives, and Methods* page is displayed.
4. Enter or edit data in the following fields: **Completion Date**, **Goal**, **Assessment Statement**, and **Collateral Input**.
5. Create a new objective by entering data in the **New Objective** text box and select a **New Objective Start** date.
6. Create a new method by entering data in the **Method #1** text box and selecting a method type from the drop-down.
7. The **Groups Linkage** field presents a checklist of groups in which the client is enrolled. Select the group or groups to be linked to the method being entered. →

*Any one group may not be linked to more than one objective / method.*

8. Repeat steps 6 – 7 as needed, adding more methods.
9. Click **UPDATE**. The Service Plan is saved and a read-only report version is displayed, including a list of the selected group linkages noted by bullets, instead of check boxes.

**New Objective Start:**  
[Dropdown] [Text Box] [Spell Check]

**Method #1:**  
[Dropdown] [Text Box] [Spell Check]

**Definitions Groups Linkage**

- Assertiveness Training
- Values and Personal Criteria
- Researching Resources
- weight management
- Coping Skills and Stress Management

The process of linking an objective/method with multiple groups is now complete.

## REVISING MULTIPLE GROUP LINKAGES ON A PLAN REVIEW

In order to revise linked groups on a plan review, you must revise the method they are linked to. AWARDS will not let you change the group linkages for a continued method.

To revise multiple group linkages during a review, complete the following steps:

1. From the AWARDS *Opening Menu* page, navigate to the client's *Individual Service Plan Index* page by clicking **Services** > selecting the **Program**, and clicking **Service Plans** > selecting the **Client**, and clicking **CONTINUE**.
2. In most cases, a Service Plan Review will have been automatically scheduled for the client when his or her initial plan was opened. If a Service Plan Review is scheduled, click the **Selected** radio button next to it and then click **CONTINUE** to open the plan's cover sheet. Otherwise, click **Update Schedule** and add one to the client's schedule and then select it.
3. Enter or edit data on the Service Plan Review cover sheet, and click **UPDATE & CONTINUE**. The *Individual Service Plan Goals, Objectives, and Methods* page is displayed.
4. Enter data in the **Review of Progress/Objective Achievement** text box and select an outcome from the **Objective Outcome** drop-down list.
5. Select an outcome from each method's **Method Outcome** drop-down list.
6. Click **UPDATE**. The Service Plan Review is saved and a read-only report version is displayed.
7. Click **Return to Data Entry**. The *Service Plan Goals, Objectives, and Methods* page is re-displayed.
8. Update the objective, if necessary, by clicking the right-hand **Objective Outcome** drop-down arrow and select one of the following outcome options: "Objective Continued," "Objective Revised (Below)," or "Objective Discontinued." If "Objective Revised (Below)" is selected, enter the new objective in the text box below. Click **CONTINUE** to save the changes, and then **Return to Data Entry** to continue revising methods.

*Methods on a revised objective cannot be revised at the same time that the objective is revised.*

9. Click the right-hand **Method Outcome** drop-down arrow and select one of the following outcome options: "Method Continued," "Method Revised," or "Method Discontinued." If "Method Revised" is selected, enter the new method in the text box below and select a new method type if needed.

*When revising methods, do not make any edits to the group linkages at this stage, since they will not be saved. You **must first review the method** without making any changes to the group linkages.*

10. Review all objectives and methods and click CONTINUE to save the changes, and then **Return to Data Entry** to continue revising group linkages.
11. Add group linkages by checking the **Groups Linkage** fields.

*Any one group may not be linked to more than one objective/method.*

12. Click **UPDATE**. The Service Plan Review is saved and a read-only report version is displayed, including the original method and its group linkages, as well as the revised method and its group linkages.

The process of revising multiple group linkages during a review is now complete.