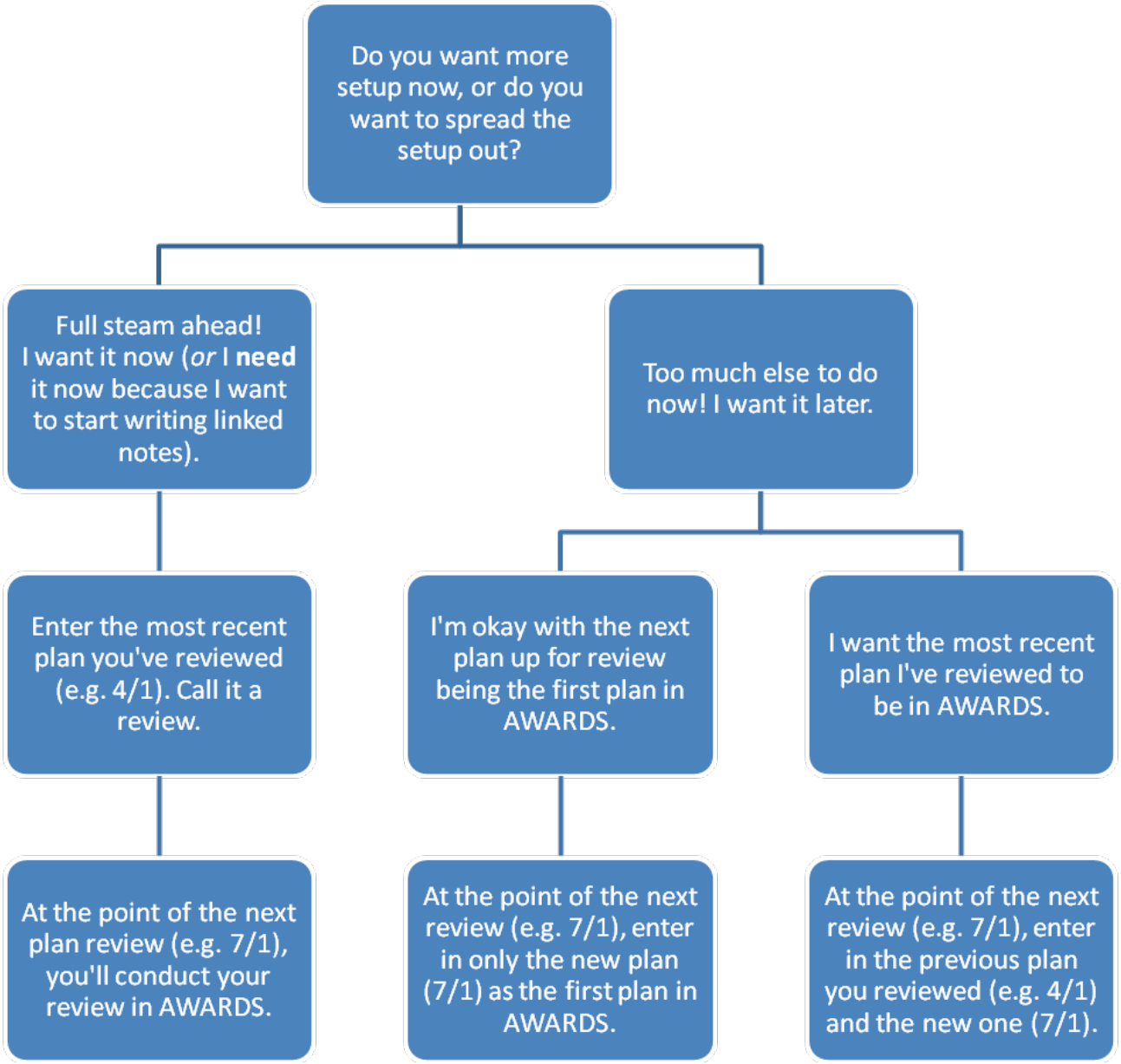
SERVICE PLANS AT IMPLEMENTATION

DATA ENTRY TIP SHEET

You have some choices around Service Plan data entry. Use this decision tree to help you decide how to proceed.



- *Note: if you are doing Service Plan Linked Notes, you must do your data entry now, and enter the most recent plan you have reviewed.*

Before embarking on this data entry:

- *Be sure the Service Plan settings have been configured by your Implementation Manager or Senior Project Manager.*

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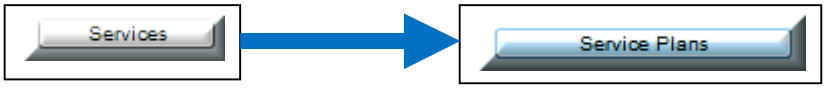
THE SERVICE PLAN SCREENS: THE INDEX VS. THE SCHEDULE

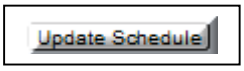
There are two main list pages you will see in AWARDS for each client, each with the same dates of Service Plans, but used for different purposes.

Everything starts here:



After a client is selected, the Service Plan Index with radio buttons displays.

The Service Plan Index is where you go to access a plan to do data entry or review in it. Also, the Due Date link will take you to a report mode plan.

But, first you will need to skip the Service Plan Index and instead click 

at the bottom of the page. This will land you on the Service Plan Review Schedule, with data entry boxes.

The Service Plan Review Schedule is where you create or modify the Due Dates, Reviewer and Done information you see on the Service Plan Index.

ENTERING IN THE MOST RECENT SERVICE PLAN

If you are entering in the most recent service plan (one your workers have done in the past, pre-AWARDS), follow these steps.

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UPDATE THE SCHEDULE

If you have an automatic service plan schedule set up then AWARDS will already have scheduled the initial plan and the admission note* automatically, based upon the Admission Date. You will need to update the schedule before you enter in any service plan data.

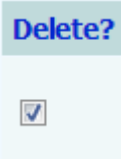
1. Click **Services**.

2. Select the **Program**. Click **Service Plans**.

3. Select the **Consumer**. Click **CONTINUE.**

4. Click **Update Schedule**.

5. *If you have the admission note scheduled, you will want to check the "Delete?" option since you will not be entering the admission note into AWARDS for existing clients.

   Click **CONTINUE** to make this Delete go into effect. Click **Update Schedule** again to get back to the schedule.

6. **Change/Enter the Due Date of the Plan Review (second line in the list) to be the date of the next plan**. This might be today, if you are about to do a plan review, or it might be a date in the distant future. The important thing is that you want the second row to represent the next undone plan. Select a reviewer. Leave the Done fields set to No, and leave the Done Date fields empty.

7. Click **CONTINUE** to save this date. When you update the page, you will be brought to the Service Plan Index.

8. Click **Update Schedule** to get back to the schedule.

9. **Change the due date of the Initial Plan to the date of the LAST service plan** review you completed for this client. You want the first line in this list to have a Due Date that corresponds to the date of the completed plan. Select a reviewer. Leave the Done fields set to No, and leave the Done Date fields empty.

   Note: It is optional for you to change the label from Initial Plan to Service Plan Review so that it displays as a review. At this point, because there is no data in the service plans, the Service Plan Review will work the same way as an initial plan. You will just enter in the current goals and objectives that are on the service plan.

10. Click **CONTINUE**. When you update the page, you will be brought to the Service Plan Index. You can now enter in the most recent service plan you completed. Note: you will enter in all of the client's current goals and objectives.

11. Once you begin to work on a service plan, AWARDS service plan auto-scheduling will begin, and the next plan will be scheduled for the correct due date. If you see the next plan is scheduled for a date that is incorrect, please contact your SPM, Implementation Consultant, or the Help Desk.

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ENTER IN THE EXISTING PLAN

1. After you have updated the schedule, you will be on the Service Plan Index for the client. This is the screen with the radio buttons.

2. Select the radio button next to the first plan on the list, the one with the due date of the plan you completed before you started using AWARDS.

   Note: If you have set up a FormBuilder form to complete with your Service Plan, use the Include drop down to select it.

3. Click **CONTINUE**. The plan will open.

4. Fill out any coversheet fields that need to be filled out on a first page, if applicable. These may include fields like Consumer Strengths, Criteria for Discharge, etc. Continue to the second page of the plan by clicking **UPDATE & CONTINUE**.

5. Fill out the Goal, and associated text boxes, including Assessment Statement/Rationale for Goal, the fields associated with your first Objective, and the fields relating to the Methods associated with that Objective. Click **UPDATE** when you are done with the data entry that is possible on this page. You will be shown a report version of what you have done thus far. Click **Return to Data Entry** to go back in to add the next piece of data, if necessary.

   NOTE: If you are working on a plan that has just one goal, you can only add one new Objective at a time. You will need to update, and go back in to add another Objective. If you are working on a plan that allows multiple goals, you can only add one Goal at a time. Once you do it a few times, you will get used to the cycle of UPDATE□Return to Data Entry.

6. Continue data entry until you have completed the entry of all components on the plan. After it has been completed, and updated, from the Plan Index click **Update Schedule**. Enter Done = Yes, Done Date = the date the plan was completed, and **CONTINUE**. The Service Plan Index will display.

ENTERING IN THE NEW PLAN/REVIEWING THE PLAN

The previous section told you how to enter in the plan that will function as your Initial Plan in AWARDS, even if it was not the first plan you did for the client. Here's how you move ahead to conduct a review of the plan.

CHECK THE SCHEDULE

1. Click **Services**.

2. Select the **Program**. Click **Service Plans**.

3. Select the **Consumer**. Click **CONTINUE.**

4. Click **Update Schedule**.

5. **Be sure the Due Date of the Plan Review (second line in the list) is the due date of the next plan**. This might be today, if you are about to do a plan review, or it might be a date in the future if you are

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reviewing a plan a few days early. The important thing is that you want the second row to represent the next undone plan. You will want to get in the habit of always checking the Due Date before you start work on a plan, as it can be problematic to change the Due Date after data has been entered.

6. Click **CONTINUE** to save this schedule page. When the page updates, the Service Plan Index will display.

REVIEWING THE PLAN

Each Service Plan Review starts with a review of the goals, objectives and methods that carried over from the previous plan, and then the opportunity to add new goals, objectives and methods. All existing plan components must be reviewed before new ones are added.

1. After you have updated the schedule, you will be on the Service Plan Index for the client. This is the screen with the radio buttons.

2. Select the radio button next to the second plan on the list, the one that is the review you are completing today.

   Note: If you have set up a FormBuilder form to complete with your Service Plan, use the **Include** drop down to select it.

3. Click **CONTINUE**. The plan will open.

4. Edit any coversheet fields that need to be edited on the first page, if applicable. These may include fields like Consumer Strengths, Criteria for Discharge, etc. Continue to the second page of the plan by clicking **UPDATE & CONTINUE**.

5. Use the drop downs to indicate if goals, objectives, and methods have been attained, progress has been made, etc. Fill out the associated text boxes. Click **Update** when you are done with the data entry that is possible on this page. You will be shown a report version of what you have done thus far. Click **Return to Data Entry** to go back in to revise any plan components, or to add new components. You must review all existing plan components before adding new items to the plan.

   NOTE: If you are working on a plan that has just one goal, you can only add one new Objective at a time. You will need to update, and go back in to add another Objective. If you are working on a plan that allows multiple goals, you can only add one Goal at a time. Once you do it a few times, you will get used to the cycle of UPDATE>Return to Data Entry.

6. Continue data entry until you have completed the entry of all components on the plan. After it has been completed, and updated, from the Plan Index click **Update Schedule**. Enter Done = Yes, Done Date = the date the plan was completed, and **CONTINUE**. The Service Plan Index will display.

7. When you have completed your first plan review, if your agency is using Automatic Service Plan Scheduling, your new review should display on both the Service Plan Index and on the Service Plan Schedule. On the Service Plan Schedule, the number of days between each plan will display. It is always a good idea to verify that the next plan is scheduled for the correct number of days in the future at the point when you are indicating the previous plan is done.

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