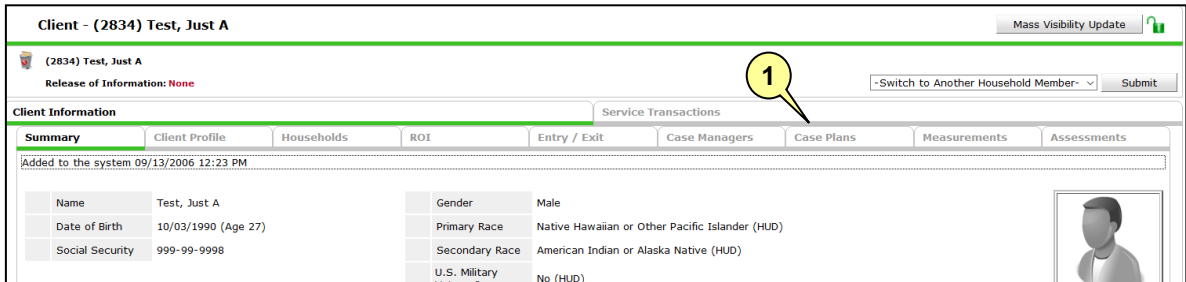

HMIS Support Manual - Creating Follow-Up Lists for Annual Assessments



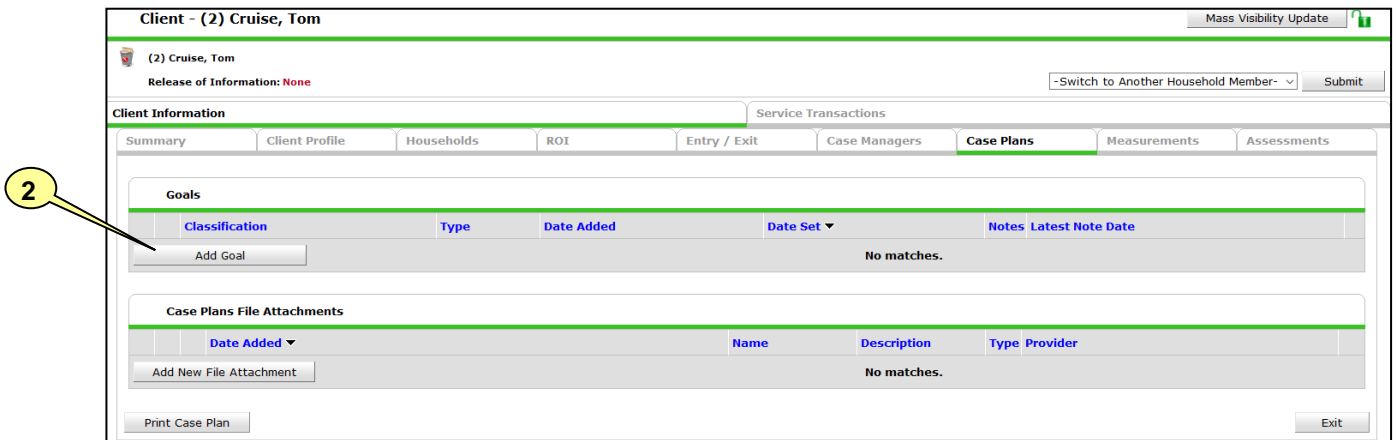
**Summit County, Ohio
Homeless Management Information System**



1. Select the Client for the follow-up list. On the **Client Profile** screen, click the **Case Plans** link. (1)



2. The screen will refresh then select **Add Goal**. (2)



3. Complete the following sections of the **Goal Data** Screen on the next page.

1. **Provider** - default provider for which the client and client goal will be associated.
2. **Date Goal was Set** – the date client entered the program.
3. **Classification** – Other
4. **Type** – Other
5. **Target Date** – Enter the intended completion date for the stated goal.
6. **Overall Status** – Closed
7. **Projected Follow Up Date** – Date the follow up will take place.

Goal - (14) Test, Just A

Household Members

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

(4) Male Single Parent

(14) Test, Just A

(45) Test, Baby

Provider *	Summit County Continuum of Care (3)	<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
Case Manager	-Select-	
Date Goal was Set *	10 / 10 / 2018	
Classification *	-Select-	
Type *	-Select-	
Goal Description		
Target Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	
Overall Status *	-Select-	
If Closed, Outcome	-Select-	<input type="text"/> / <input type="text"/> / <input type="text"/>
If Partially Complete, Percent Complete	-Select-	
Projected Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	
Follow Up User	Summit County Continuum of Care (3)	<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
	-Select-	
Follow Up Made	-Select-	
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	
Outcome at Follow Up	-Select-	