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| **Summary:**  Use the Case Plan v5.5 page to add and view services for your client; all services will be displayed here no matter what page was used to record them. |  |
| **Start**: **Record Services on Intervention tab: Component sub-tab:**   * Open Component tab * Select appropriate Milestone * Click **NEW** in Activity section at bottom * Enter or select Activity data as required * Click **SAVE**   If Component is not displayed, click SHOW ALL button on right side of page |  |
| **Next**: **Record Milestone Status Updates on Intervention tab: Component sub- tab:**   * Open Component tab * Select the appropriate Milestone * Select Status and Date, Comments are optional * Click **SAVE**   Refresh Milestones brings in new Milestones for active client |  |
| **Switch between viewing Only Linked Components and viewing All Components**  Use **FILTER TO GOAL DOMAINS /COMPONENTS** to show components linked to a task  Use **SHOW ALL** to show all components  When viewing Components of other Programs,  you will be able to only view the services,  not add or edit them |  |
| **Services Options:**   * Some Services may have different fields available, such as End Date or Time * If Complete checkbox is displayed and checked, selected Milestone status will be changed to “Complete” automatically * Amount, Location, Description, Comments are all optional * SCHEDULE opens popup to schedule recurring activity * STATUS opens popup to record current  Status and displays in Status column * Activity Type column indicates on which page the service was recorded |  |