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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 taskUse **SHOW ALL** to show all componentsWhen 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
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