

# Adding a Client Goal

CLIENT: Test Smith 2013 (#285419) TEST

### Add Goal

- Add Program from a Goal Template
- Add Free-Form Goal / Client Action Plan

ABRA Housing (CACD)  
Assurance 16 Program (CTE)  
Beyond Shelter (TEAM)  
Case-Management Walk-In (TVCCA)

*To provide homelessness prevention and rapid re-housing services and avoid or shorten shelter stays.*

Due: 6/1/2015

save cancel

Choose the goal to add

Enter the goal due date

Click the Save button

CLIENT: Test Smith 2013 (#285419)

### Enter Goal Due Dates

Steps:

Due	Step
6/1/2014	Complete assesment and application in HMS, utilizing the HPRP forms.
6/1/2014	Decide with applicant what financial assistance will be needed.
6/15/2014	Gather documentation needed to complete application.
6/30/2014	Request payments.
7/30/2014	30 day follow-up.
9/30/2014	90 day follow-up.
6/30/2015	365 day follow-up.

save cancel

Enter due dates for ALL listed steps

Click the Save button



## Adding a Client Goal (continued)

TribeWare Universal System client menu

CLIENT: Test Smith 2013 (#285419) TEST

### View Client Goal

**CLIENT GOAL**

Goal Title: ARRA Housing (CACD)  
Entered By: Test Admin

Due Date: 6/1/2015  
Started: 5/20/2014

**view client goal**

Due	Completed	Step
6/1/2014		Complete assesment and application in HMIS, utilizing the HPRP forms.
6/1/2014		Decide with applicant what financial assistance will be needed.
6/15/2014		Gather documentation needed to complete application.
6/30/2014		Request payments.
7/30/2014		30 day follow-up.
9/30/2014		90 day follow-up.
6/30/2015		365 day follow-up.

**ADDED OPTIONAL STEPS**

Due	Completed	Step
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When you have completed a goal step, click on the calendar icon to enter a date of completion.

TEST

### Edit Goal Dates

DUE	COMPLETED	GOAL STEP
6/1/2014	6/1/2014	Complete assesment and application in HMIS, utilizing the HPRP forms.
6/1/2014	6/1/2014	Decide with applicant what financial assistance will be needed.
6/15/2014		Gather documentation needed to complete application.
6/30/2014		Request payments.
7/30/2014		30 day follow-up.
9/30/2014		90 day follow-up.
6/30/2015		365 day follow-up.

save cancel

Enter the dates of completion for any step that is completed

Click the Save button



## Adding a Client Goal (continued)

**View Client Goal**

**CLIENT GOAL**

Goal Title: ARRA Housing (CACD)  
 Entered By: Test Admin

Due Date: 6/1/2015  
 Started: 5/20/2014  
 Completed:  
 Exited:

The dates of completion are now visible on the View Client Goal screen

**MANDATORY STEPS**

Due	Completed	Step
6/1/2014	6/1/2014	Complete assesment and application in HMIS, utilizing the HPRP forms.
6/1/2014	6/1/2014	Decide with applicant what financial assistance will be needed.
6/15/2014		Gather documentation needed to complete application.
6/30/2014		Request payments.
7/30/2014		30 day follow-up.
9/30/2014		90 day follow-up.
6/30/2015		365 day follow-up.

Click here to add additional options for the client

**ADDED OPTIONAL STEPS**

Due	Completed	Step
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**Add Client Goal Option**

Options:

- Provide rent assistance.
- Provide rent arrearage assistance.
- Provide utility assistance.
- Provide utility arrearage assistance.
- Provide security deposit assistance.
- Provide moving expenses assistance.
- Provide storage expenses assistance.
- Provide motel/hotel voucher.

Save List:

- Provide rent assistance.
- Provide rent arrearage assistance.
- Provide utility assistance.

Date Due: 05/20/2014  
 Date Completed: 05/20/2014

save cancel

Click on an entry here to ADD it to the save list

Click on an entry here to DELETE it from the save list

The due date and completion dates default to the current date. Edit these as necessary.

**NOTE:** a due date is necessary but a completion date is not.

Click the Save button

## Adding a Client Goal (continued)

**KeyWare**

**View Client Goal**

**CLIENT GOAL**

Goal Title: ARRA Housing (CACD)  
Entered By: Test Admin

Due Date: 6/1/2015  
Started: 5/20/2014  
Completed:  
Exited:

**MANDATORY STEPS**

Due	Completed	Step
6/1/2014	6/1/2014	Complete assesment and application in HMIS, utili forms.
6/1/2014	6/1/2014	Decide with applicant what financial assistance wi
6/15/2014		Gather documentation needed to complete applica
6/30/2014		Request payments.
7/30/2014		30 day follow-up.
9/30/2014		90 day follow-up.
6/30/2015		365 day follow-up.

**ADDED OPTIONAL STEPS**

Due	Completed	Step
5/20/2014	5/20/2014	Provide rent assistance.
5/20/2014	5/20/2014	Provide rent arrearage assistance.
5/20/2014	5/20/2014	Provide utility assistance.

The optional steps you added are now visible on the View Client Goal screen

