



Operations Manual

Governed By: Operations	Effective Date: 8/5/2013
Procedure: #2 CAP 60 Goal Plans/CSBG	Updated Last: July 2015
Purpose: To provide guidance for entering goal plans and linking goals to CSBG outcomes in the computerized program.	

Summary:

Family Goals

CAP --> Family Information --> Sidebar --> Family Goals (In-depth Case Management) --> Add Goal

This page allows you to set up a Family Goal. In a Family Goal, the goal itself is a NPI or program specific goal. Enrollment and achievement of this Goal will reflect into the CSBG Report.

Date – Date the goal is opened.

Year – Should coincide with the CSBG year.

Family Member – This is the Family Member trying to achieve the goal.

Need – This lets you enter the family need that motivates the achievement of the Goal.

Operations Manual

Motivation – Lets you explain the motivation in more in detail.

Assets – Lets you list what the family has in place that will assist in meeting the Family Goal.

What has worked in the past – Lets you list methods and things that have historically worked for the family in their quest to meet specific goals.

Comment – Lets you leave any notes regarding this Family Goal.

Achievement Date – An “Achievement Date” must be entered for a particular goal to show up on the CSBG reports!

Attempted – a small check box is available at the bottom to notate when a goal was attempted.

The screenshot shows the 'Add Goal' form with a sidebar on the left containing 'Search', 'Add Household', and 'Quick Service'. The main form has sections for 'Assets', 'What Has Worked In the Past', 'Comment', and 'Achievement Date'. At the bottom right, there is an 'Attempted' checkbox. A red box highlights the 'Achievement Date' and 'Attempted' fields, with arrows pointing to them from the text above.

Save – This saves the data entered and creates a row in the Family Goals page

Save & New – This saves the data entered and brings you back to the current page to allow you enter more Goals.

Cancel – This cancels the request and not save any data. It will bring you back to the Family Goals page.

The screenshot shows the 'Add Goal' form with a sidebar on the left containing 'CAP', 'Family Information', 'Case Information', 'Employment', 'Family Eligibility Income', and 'Self Sufficiency Matrix'. The main form has 'Add Goal' buttons and a table with the following data:

Family ID/No.	Head of Household	Family Eligibility Income	No. in Household	No. of Families
9871	Schmoe, Joe	N/A	1	1

CAP --> Family Information --> Sidebar --> Family Goals (In-depth Case Management) --> Shared Case Management Goals

Once goals are added, they can be managed from the “Family Goals” section.

Barriers, Objectives, and Activities

– can be added quickly under “Details”
Use the to edit in depth and to delete a goal.

The screenshot shows the 'Shared Case Management Goals' section in the CAP system. It includes a sidebar with 'CAP', 'Family Information', 'Case Information', 'Employment', 'Family Eligibility Income', 'Self Sufficiency Matrix', 'Emergency Contacts', 'EN005 Form', 'Housing Information', 'Medical History', 'Family Expenses', 'Financial Information', 'Family Notes', 'Signed Authorization Forms', 'Shared Assessment', 'Family Goals', 'Program Goals', 'Referrals', and 'Survey Response'. The main area shows a table with the following data:

Date	Added from	id/familymember	Need and Outcome	Achieved	Details
07/28/2015	Family Goals 2015	Joe Schmoe	Dental Work 14.F. Scheduled a Dental Appointment		Barrier (Add) Objective (Add) Activity (Add)
07/28/2015	Family Goals 2015	Joe Schmoe	Health 14.H. Attended Dental Appointment		Barrier (Add) Objective (Add) Activity (Add)



Operations Manual

CAP --> Sidebar --> Program Goals

This page will list all the **Program Goals** (that are mapped) and all the goals from the “**Family Goals**”.

- CAP
- * Family Information
- * Case Information
- * Employment
- * Family Eligibility Income
- * Self Sufficiency Matrix
- * Emergency Contacts
- * EN005 Form
- * Housing Information
- * Medical History
- * Family Expenses
- * Financial Information
- * Family Notes
- * Signed Authorization Forms
- * Shared Assessment
- * Family Goals
- * Program Goals
- * Referrals
- * Survey Response
- 🔍 Family Printable Documents
- 🔍 Agency Printable Documents
- 🔍 Search
- 🔍 Add Household
- 🔍 Quick Service

Family ID/No.		Head of Household	Family Eligibility Income	No. in Household	No. of Families
9871		Schmoe, Joe	N/A	1	1

Program Goals	
Family Member	All
Program	Select One
Year	Select One

Date Enrolled	Household Member	Goal	Added from	Achievement Date
06/30/2015	Joe Schmoe	1.3 A.1 Number and percent of participants in tax preparation program who qualified for any type of Federal or State tax credit and the expected aggregated dollar amount	VITA - 2015 Program Mapping	
06/30/2015	Joe Schmoe	1.3 A.1 Obtained Federal Earned Income Tax Credit (EITC)	VITA - 2015 Program Mapping	
06/30/2015	Jody Schmoe	2.3 A Number of community members mobilized by Community Action that participate in community revitalization and anti-poverty initiatives	Community Connections - 2015 Program Mapping	
06/30/2015	Jody Schmoe	2.3 B Number of volunteer hours donated to the agency (This will be ALL volunteer hours)	Community Connections - 2015 Program Mapping	
06/30/2015	Jody Schmoe	6.5.E Information and Referral Calls	Community Connections - 2015 Program Mapping	
06/30/2015	Joe Schmoe	4.1.N The total number of organizations CAAs work with to promote family and community outcomes	VITA - 2015 Program Mapping	
06/30/2015	Jody Schmoe	4.1.N The total number of organizations CAAs work with to promote family and community outcomes	Community Connections - 2015 Program Mapping	
06/30/2015	Jody Schmoe	1.3.D Number and percent of participants demonstrating ability to complete and maintain a budget for over 90 days	Community Connections - 2015 Case Mgmt	
07/28/2015	Joe Schmoe	14.F. Scheduled a Dental Appointment	Family Goals Page - 2015	
07/28/2015	Joe Schmoe	14.H. Attended Dental Appointment	Family Goals Page - 2015	