

South Carolina Ryan White

Action Plan User Manual

Created for:
SC Design of Provide Enterprise
v4.2

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South Carolina Ryan White
SC Design of Provide Enterprise v4.2
Action Plan User Manual; Table of Contents

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South Carolina Ryan White Part B
SC Design of Provide Enterprise v4.2
Action Plan User Manual

Basic Action Plan Terminology:

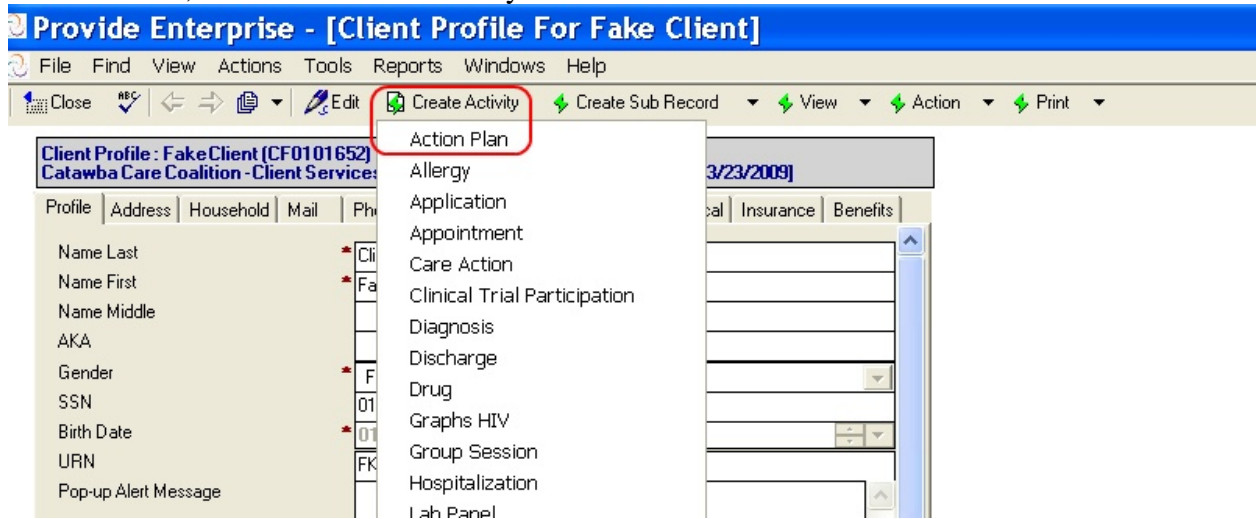
- Action Plan: The overall plan that outlines the work to be done by the Medical Case Manager (MCM) and the Client (CL) to help the client reach specific health outcomes and goals. The plan should include goals as they relate to the client's HIV/AIDS diagnosis and medical care. Action Plans have replaced what was formerly known as a "service plan". However, they meet HRSA's (Ryan White Federal Funders) definition of a service plan.
- Action Plan Goals: The specific goals that the client has in regard to his/her HIV/AIDS care and overall well-being.
- Action Plan Steps: The specific activities that must be done for the client to reach his/her goals.

HRSA Defined Medical Case Management:

Medical Case management services (including treatment adherence) are a range of client-centered services that link clients with health care, psychosocial, and other services. The coordination and follow-up of medical treatments is a component of medical case management. These services ensure timely and coordinated access to medically appropriate levels of health and support services and continuity of care, through ongoing assessment of the client's and other key family members' needs and personal support systems. Medical case management includes the provision of treatment adherence counseling to ensure readiness for, and adherence to, complex HIV/AIDS treatments. Key activities include (1) initial assessment of service needs; (2) development of a comprehensive, individualized service plan; (3) coordination of services required to implement the plan; (4) client monitoring to assess the efficacy of the plan; and (5) periodic re-evaluation and adaptation of the plan as necessary over the life of the client. It includes client-specific advocacy and/or review of utilization of services. This includes all types of case management including face-to-face, phone contact, and any other forms of communication.

Creating an Action Plan in Provide Enterprise (PE):

- Select the client's name, or go into the client's profile to begin creating an Action Plan.
- As shown below, click on "Create Activity" and select "Action Plan"



Note: If your client already has an Active, Open Action Plan, the existing Action Plan will open up instead of creating a new one. To create a new one, you must first close out the existing Action Plan. (See Section V. below for instructions to close an Action Plan.)

- The Action Plan will automatically be assigned to the person who created it (whose computer is being used). If you need to change the "Assigned Case Manager", click the button as shown below :



- Next, you will want to add the client's goals to the Action Plan. You can do this by using the Action Plan templates (pre-written) or manually (you write out the goal specifically). However, SC DHEC recommends that you use the templates when available, to measure and track goal outcomes throughout the state. Action plan templates should be individualized for each client through the steps/activities. Therefore, if a client's goal is available in a template, that one should be used.
- To create Action Plan goals using the templates, click the "Add Template Goal" button as shown in the picture below

Action Plan Status	Open
Assigned Case Manager	Jennifer McDaniel
Date Opened	03/25/2009
Date Completed	
Completed By	
Last CM Review Date	
Last CM Reviewed By	
Last Supervisor Review Date	
Last Supervisor Review By	
Goals and Steps	

Description

- You will now want to select the goals that you and the client have agreed to work on together. You may select more than one goal using the ✓ marks (this is done by clicking your mouse on the left side of the line) beside each goal as shown below:

Select From View

Please select items from the view.

Category	Name
✓	ADAP/DAP CL will have access to prescribed medications.
	Adherence CL will understand how to take medications correctly and be adherent with taking medications.
✓	Benefits CL will have continuous health insurance coverage for medical care and prescription needs. CL will obtain a Medicare Part D plan to assist CL in accessing prescription drugs. CL will obtain SC Medicaid benefits. CL will obtain Social Security Disability approval and income.
	Dental Care
	Employment
	Failing Health
	Food
	General Health Care
	HIV Specialty Care
	Housing
	Legal (Non-Criminal)
	Mental Health
	Risk Behavior


3

OK Cancel

- Once the goals have been selected, PE will then ask you to select the steps for each goal as shown below. You must first click the arrow beside the goal statement to show the steps associated with that goal. Then you can select all the steps you want for the goal at the same time using the ✓ marks again (pictured below). There should be steps for the both you (MCM) and CL to do to reach the goal. Simply click “OK” once you are finished selecting the steps. Each goal that was selected (if multiple goals were selected at one time) will appear as below for you to select the steps.

Select From View

Please select items from the view.



Goal Name	Step Name
CL will establish comprehensive HIV medical care.	01 - MCM will refer CL for HIV medical care with an ID physician.
	02 - MCM will refer the client to a physician for primary medical care.
	03 - CL will schedule and keep medical intake appointment with ID physician.
	04 - CL will schedule and keep an initial medical appointment with a primary care provider.
	05 - CL will inform MCM if any assistance is needed to schedule and/or get to the initial medical ap
	06 - MCM will assess CL needs and assist with removing barriers that may prevent the CL from ac
	07- MCM will obtain information from the client's medical providers to know client's current health

- After all of the steps have been selected for each goal, your main screen in the Action Plan will look like the picture below. You can then go into the steps and/or goals by double clicking on each step or goal (pictured below) and edit them as needed. This will allow you to individualize activities, change the ordering of steps (1,2,3...), change target dates, etc. You will also want to go into the goal to set it's prioritization number (shown defaulted as 99 in the picture below)

Action Plan: FakeClient (CF0101652)
Catawba Care Coalition - Client Services : Jennifer McDaniel/Catawba/SCGov [05/07/2009]

Summary | Notes

Action Plan Status: **Open**

Assigned Case Manager: **Jennifer McDaniel**

Date Opened: 05/07/2009

Date Completed:

Completed By:




Last CM Review Date:

Last CM Reviewed By:

Last Supervisor Review Date:

Last Supervisor Review By:

Goals and Steps

  Add Manual Goal  Add Template Goal

Description

Goal: Open - 99 - 2010/05/07 - Mental Health - CL will obtain mental health services.

.....Step: Open - 2009/06/06 - 01 - MCM will refer CL to a mental health counselor.

.....Step: Open - 2009/06/06 - 02 - MCM will have CL to sign an appropriate release authorization for follow

.....Step: Open - 2009/08/05 - 03 - CL will schedule and keep an initial appointment with the counselor.

- Once you enter into the goal, you will add the goal's priority number by simply typing in a number into the "Goal Priority Level" field shown below.

Action Plan Goal : Fake Client (CF0101652)
Catawba Care Coalition - Client Services : Jennifer McDaniel/Catawba/SCGov [05/07/2009]

Summary | Notes

Goal Status	* Open
Goal Priority Level	*
Goal Type	* Standard
Goal Category	* Mental Health
Goal Statement	* CL will obtain mental health services

- If you need to add more steps to the goal, or missed adding some from the template when originally prompted to do so, you can do this by clicking "Add Manual Step" or "Add Template Step". Note: You are able to add manual steps to any goal, but you can only add template steps to template goals. Also, you cannot add template steps to a manual goal.

Target Resolution Date * 03/25/2010

Provider Assigned Jennifer McDaniel

Action Plan Goal Steps

Status	Name	End Date
Open	01 - CL will provide MCM with insurance information (copy of card, t	2009/04/24
Open	03 - MCM will obtain a release of information to be able to work with	2009/04/24
Open	07 - CL will inform CM if he/she receives any information regarding i	2009/09/21

- Note: If you need to assign a goal to someone other than yourself (or whose computer you are on) then you can change this in the same way you changed the Action Plan assigned case manager as shown above (2nd picture).
- If you need to add a goal manually, place the Action Plan in "Edit" mode and click on the "Add Manual Goal" button as shown above. You will get a screen where you will have to fill in all of the information required for the goal. (Shown below) *Remember: You can only add manual steps to a manual goal.*

Action Plan Goal : Fake Client (CF0101652)
Catawba Care Coalition - Client Services : Jennifer McDaniel/Catawba/SCGov [03/25/2009]

Summary | Notes

Goal Status * Open
 Goal Type * Manual
 Goal Category * ADAP/DAP
 Goal Statement *
 Date Goal Established *
 Target Resolution Date *
 Provider Assigned *
 Action Plan Goal Steps *
 Add Manual Step Add Template Step

Status	Name	End Date

In adding manual goals, you must choose a “Goal Category” from the list that is provided (as shown above) and you must also type out the “Goal Statement”.

- After the manual goal has been added, click the “Add Manual Step” button as shown above to add the goal steps. Once in the manual step document, you will fill in the fields as shown below.

Action Plan Step : Fake Client (CF0101652)
Catawba Care Coalition - Client Services : Jennifer McDaniel/Catawba/SCGov [03/25/2009]

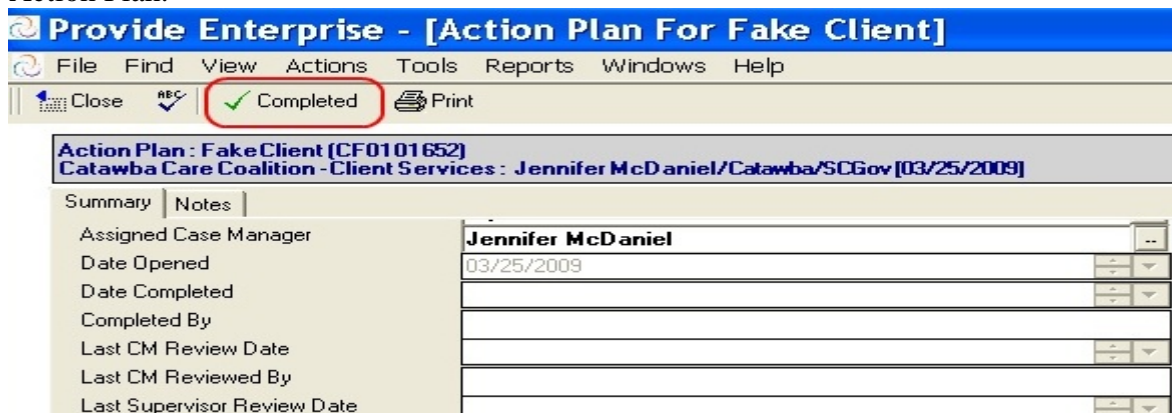
Summary | Notes

Step Status * Open
 Associated Goal * xxxxxxx
 Step Name * 01 - xxxxxx
 Date Step Started * 03/25/2009
 Date Step Target Close *

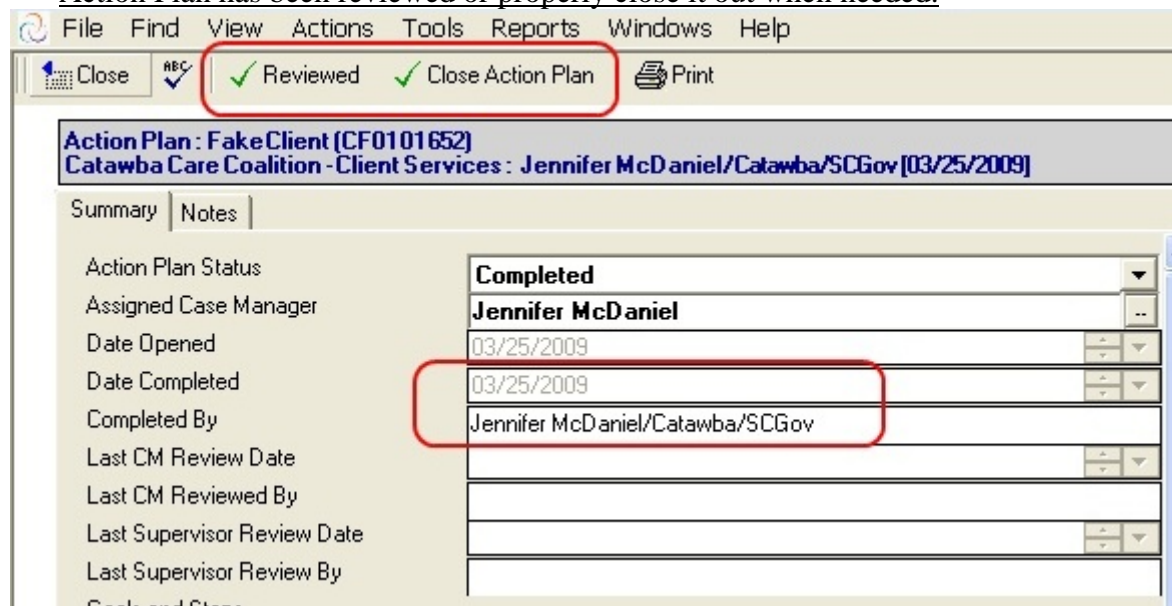
Close Save And Create Another

- Note: You want to be sure to number the steps as shown in the “step name” field to allow the steps to be put in the correct order under the goal on the Action Plan when it is printed. The step name is also where you actually type out what activity will be done- not just a “name” as the field indicates.
- To add additional steps, you can use the “Save And Create Another” button as shown above. Note: You will get an error message stating that you have not entered in a target close date if you do not first tab off of the “Target close date” field before you click this button. If you get

the error message and the information is filled in, just click OK and click the “Save and Create Another” button again for it to move on to the next step. Once you have added all of the goals and steps that you need to for the client’s Action Plan, it is time to “✓Complete” the Action Plan. Note: It is OK and recommended that you go ahead and mark the Action Plan as “complete” once you have it fully entered into PE. You do not need to wait until the client sees it and signs it because that will limit your ability to review the Action Plan later. The completion date that you enter should reflect the date that you and the client met/discussed the Action Plan and what goals would be placed on it (usually the intake or reassessment date). The Action Plan “Date Open” field cannot be changed and it reflects the date that the Action Plan was started in PE. If you get something wrong or need to make changes later after the client has reviewed it, then you do so as this should be a working/changing document. The picture below shows you what to click to “Complete” the Action Plan.



- Once the Action Plan has been marked as “Completed”, you will be prompted to enter in a “Completion Date”. After its marked “Complete”, the top buttons of the Action Plan will change to give you the option of “reviewing” or “closing” the Action Plan as shown below. Until the plan is marked as “Completed”, you will not be able to document in PE that the Action Plan has been reviewed or properly close it out when needed.



- The Action Plan is now ready to be printed. The customized printout will allow you to look over it with the client and have the client sign the Action Plan. To print the Action Plan correctly, be sure to click the “Print” button as shown below. Note: Do not print by clicking the windows “File”, “Print” buttons.



Reviewing/Updating an Action Plan in SC Design of Provide Enterprise:

- Now that the Action Plan has been completed with the client, you can track the progress and document official Action Plan reviews as required by SC MCM standards (Once every 6 months). Remember, an Action Plan Review is an instance where MCM AND the CL discusses what progress has been made on Action Plan goals/steps, and if any goals/steps need to be added and/or removed from the plan.
- To get to the client's *open* Action Plan, you will click on the client's name, or enter into the client's profile record, and click “View Activity” as shown below.



- Once you get to the Activity documents, select the “Action Plan” for the client using the green drop down arrow and double clicking on the open Action Plan. You must then place the Action Plan in “Edit” mode by clicking the “Edit” button on top of the page to be able to “Review” it and make changes.
- Just as you did when creating the Action Plan, you can double click on the Action Plan Goal and/or Action Plan Steps and edit them as needed. You can also add Action Plan goals and/or Steps as you need to, using the “Add Manual Goal”, “Add Template Goal”, “Add Manual Step”, or “Add Template Step” buttons from within the Action Plan document. (See pictures in the “Creating an Action Plan” section above if needed)
- If goals and/or steps are remaining open and active, then you will want to be sure to AT LEAST update the “target resolution date” for them since these determine when the Action Plan “reminder” gets put on your PE Task list. You simply put the goal and/or step documents in edit mode and change the date as needed. (Pictured below)

Action Plan Goal : Fake Client (CF0101652)
Catawba Care Coalition - Client Services : Jennifer McDaniel/Catawba/SCGov [03/25/2009]

Summary | Notes

Goal Status	* Open
Goal Type	* Standard
Goal Category	* Benefits
Goal Statement	* CL will have continuous health insurance coverage for medical care and prescription needs.
Date Goal Established	* 03/25/2009
Target Resolution Date	* 03/25/2010

Action Plan Step : Fake Client (CF0101652)
Catawba Care Coalition - Client Services : Jennifer McDaniel/Catawba/SCGov [03/25/2009]

Summary | Notes

Step Status	* Open
Associated Goal	* CL will have access to prescribed medications.
Step Name	* 03 - MCM will assist CL in applying for DAP programs as needed and available to assist CL in accessing medications.
Date Step Started	* 03/25/2009
Date Step Target Close	* 09/21/2009

- If you need to close out an Action Plan goal, you will go into the goal document and click the “✓Close Action Plan Goal” button at the top of the document. You will be prompted and asked if you want to close out all of the steps associated with the goal. If you click “Yes”, then all of the steps will be closed out automatically for you. You will then need to enter in an Action Plan “resolution date” and “outcome” for the goal (these are required fields). See illustrations below for all these steps in closing out an Action Plan goal.

Provide Enterprise - [Action Plan Goal For Fake Client]

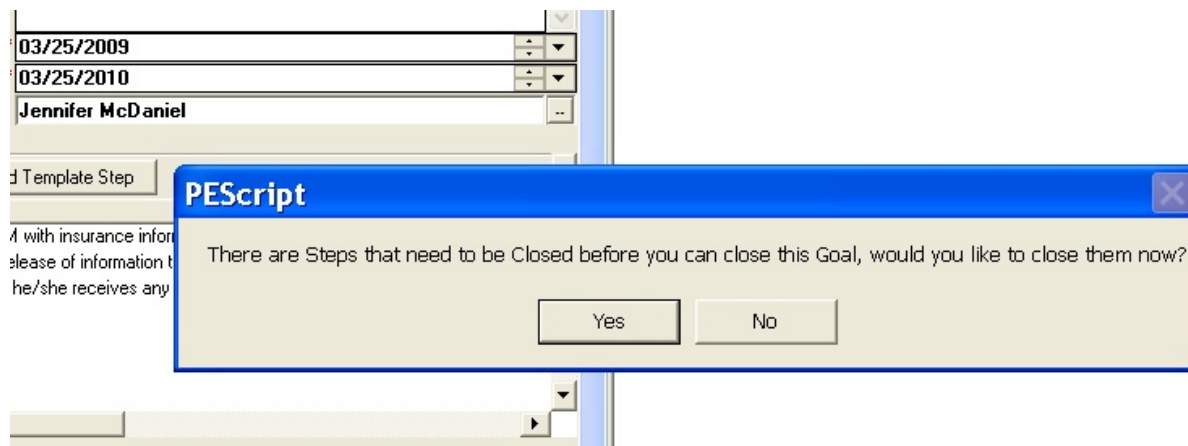
File Find View Actions Tools Reports Windows Help

Close Delete Save And Create Another Close Action Plan Goal

Action Plan Goal : Fake Client (CF0101652)
Catawba Care Coalition - Client Services : Jennifer McDaniel/Catawba/SCGov [03/25/2009]

Summary | Notes

Goal Status	* Open
Goal Type	* Standard
Goal Category	* Benefits
Goal Statement	* CL will have continuous health insurance coverage for medical care and prescription needs.
Date Goal Established	* 03/25/2009



Action Plan Goal : Fake Client (CF0101652) Catawba Care Coalition - Client Services : Jennifer McDaniel/Catawba/SCGov [03/25/2009]	
Summary	Notes
Goal Status	* Closed
Goal Type	* Standard
Goal Category	* Benefits
Goal Statement	* CL will have continuous health insurance coverage for medical care and prescription needs.
Date Goal Established	* 03/25/2009
Target Resolution Date	* 03/25/2010
Actual Resolution Date	* [Empty]
Outcome Measure	* [Empty]
Outcome Comments	Failed Due to Non-Compliance Failed Due to other No Longer Appropriate Partially Successful Successful
Provider Assigned	
Action Plan Goal Steps	

Note: Closed action plan goals will no longer show on the action plan printed report in full (goal and steps). Only the goal heading will show (at the end of the action plan) with the goal statement, status, category, dates, and outcome information.

- To close out an Action Plan step, you will change the "Step Status" field to "Closed" using the drop down arrow on the right side of the field. Once this is changed to *Closed*, the "Actual Closed Date" field will appear at the bottom for you to enter in a close date. Steps do not have associated outcomes with them, only Action Plan goals have outcomes.

Action Plan Step : Fake Client (CF0101652)
Catawba Care Coalition - Client Services : Jennifer McDaniel/Catawba/SCGov [03/25/2009]

Summary | Notes

Step Status: Closed

Associated Goal: CL will have access to prescribed medications.

Step Name: 05 - CL will inform MCM if his/her prescription needs change.

Date Step Started: 03/25/2009

Date Step Target Close: 09/21/2009

Date Step Actual Closed:

- In addition to documenting changes in target dates, adding goals and/or steps, etc., you can also enter in “Notes” about the progress being made on each goal, step, and/or overall Action Plan. Notes can include general open text that you write out or it can be a selected statement about the progress that has been made on them. All notes that are entered in will be printed on the Action Plan. It is your choice to use the “Notes” tab to monitor the Action Plan and the CL’s progress in reaching goals.
- To add a “Note” to the overall Action Plan, a specific goal, and/or a specific step, all of the documents have this tab called “Notes” on it beside the “Summary” tab. Simply click on it to add the notes.

Action Plan Step : Fake Client (CF0101652)
Catawba Care Coalition - Client Services : Jennifer McDaniel/Catawba/SCGov [03/25/2009]

Summary | Notes

Step Status: Open

Associated Goal: CL will have continuous health insurance coverage for medical care and prescription needs.

- Once you click on the “Notes” tab, you will get a screen similar to the one below (Note: all of the notes screen are similar, but the Action Plan notes tab has the “general comments” box at the bottom of the page where it is at the top of the page for goals and steps).

- To add general comments, simply type them into the box once the screen is put into “Edit” mode. If you choose to “Add Note” (this is where you document progress using pre-set criteria) you will get a screen that looks like the one below. You will enter the “review date”, what type of “current progress” has been made, and enter in any open text you want in the “notes” field. Again, these fields are similar in all the “Add Note” tabs.

After you have updated/added/closed/made notes on the Action Plan, goals, and/or steps, you will want to mark the Action Plan as *Reviewed*. To do this, you simply click the “✓Reviewed” button as shown below. Once you click the “✓Reviewed” button you will be prompted to put in a Review Date. Again, this date is the date that you and the CL actually reviewed the plan (not the date you updated it in PE- if that is different). The “Reviewed by” field is automatically computed from the user logged into PE.

- Note: Once the plan has been marked *Reviewed* the Action Plan status is changed from *Completed* to *Reviewed*, and you can quickly see the last time the Action Plan was reviewed. It is extremely important to mark the Action Plan as “reviewed” in PE if a review is done because

this will be the way to measure if you (and your agency) are meeting MCM standards that relate to Action Plans.

- Supervisor Review: Note: Supervisors can mark the review of the client’s Action Plan in PE too. Currently SC DHEC does not require Action Plans to be reviewed by a supervisor, however, this option is available to any agency that wants to use it. The supervisor review button works just as the “Reviewed” button where a prompt is given to enter in the review date.
- You can then print out the updated and reviewed Action Plan to share changes with your client and sign the revised Action Plan.

Linking Action Plan Goals and Progress Logs:

- As a MCM, it is necessary to document every encounter with (or on behalf of) a CL in a Progress Log. It is also important to make sure that encounters, activities and services relate back to each CL’s Action plan and Goals. PE provides various tools to assist you documenting interventions and progress. The SC Action Plan Design allows you to access and update the Action Plan from the Progress Log.
- To “link” a Progress Log to an establish Action Plan Goal; click the “Goals Addressed” tab from the Progress Log.

Progress Log: Fake Client (CF0101652)
Catawba Care Coalition - Client Services : Jennifer McDaniel/Catawba/SCGov [03/25/2009]

Main | **Goals Addressed** | Care Actions | Applications | Services Provided

Status * **In Progress**

Provider * **Jennifer McDaniel**

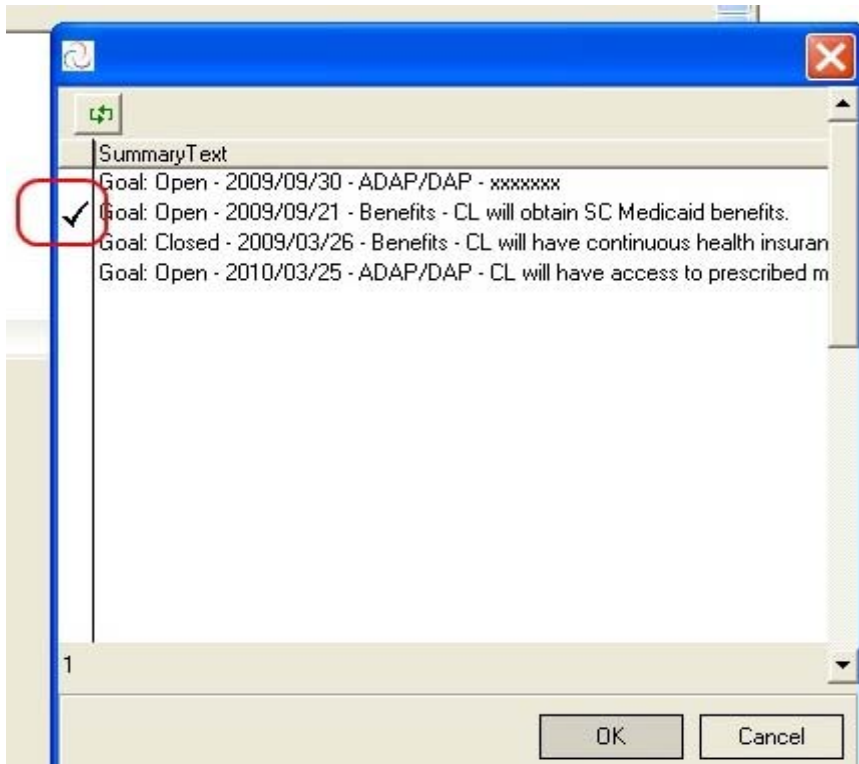
- You will see a screen to click on the small box in the right-hand corner. This button (pictured below) to pull up a list of *open* and *closed* Action plan goals established for the CL (open and closed goals). You will simply select the goal(s) related to the Progress Log using the “✓” mark.

Progress Log: Fake Client (CF0101652)
Catawba Care Coalition - Client Services : Jennifer McDaniel/Catawba/SCGov [03/25/2009]

Main | Goals Addressed | Care Actions | Applications | Services Provided

Action Plan Goals Addressed

[Small box with right arrow and three dots]



- Once the goal(s) is selected, it will appear under the “Goals Addressed” tab as shown below. Now you can actually go to that goal and edit/update any step information as needed (possibly close out steps that have been completed or add new ones based on the encounter with the CL). You do this by double clicking on the goal that is listed in the “Goals Addressed” tab. Once in the goal, double click on the steps to update/edit them.



- Note: You cannot edit or change the Action Plan goal from the progress log link. You must go to the client’s Action Plan to add/remove Action Plan goals. To mark the Action Plan as “reviewed”, you must also go to the client’s Action Plan.
- Once progress logs are linked to Action Plan Goals, this linkage is displayed when the Action Plan prints and from the “Notes” tab within the Action Plan Goal as pictured below.

Action Plan

Client Name: Fake Client

Client ID: CF0101652

Date Opened: 03/25/2009

Date Completed:

Date Reviewed:

Date Closed:

Goal: xxxxxxxx					
Status: Open	Category: ADAP/DAP	Start: 03/25/2009	Target: 09/30/2009	Actual:	Outcome:

Goal: CL will obtain SC Medicaid benefits.					
Status: Open	Category: Benefits	Start: 03/25/2009	Target: 09/21/2009	Actual:	Outcome:

Progress Logs

Date: 03/25/2009 **By:** Jennifer McDaniel **Brief Description:** CL got Medicaid approved

Action Plan Goal : Fake Client (CF0101652)
Catawba Care Coalition - Client Services : Jennifer McDaniel/Catawba/SCGov [03/25/2009]

Summary Notes

General Action Plan Goal Notes

Action Plan Goal Note(s)

Add Note

Date	By	Progress

Action Plan Related Progress Logs

Add Note

Date	By	Brief Description
2009/03/25	Jennifer McDaniel	CL got Medicaid approved

Action Plan Reminders - Required Actions and the Task List:

- SC Design of PE is informs you of the following Action Plan needs:
 1. An Action Plan Goal target resolution date is due in 14 days.
 2. An Action Plan Step target resolution date is due in 14 days.
 3. An Action Plan Review is due for a 6-month review in 30 days.
 4. An Action Plan is missing/ does not exist for an Open, case management client.

Below is a picture of the PE activity view of “My Tasks by Client” in your initial PE login screen, this is set to be first screen you see when you enter into PE. This screen is where you will find/see the reminders and notices for Action Plan-related tasks (listed above).

Client	Date Due	Type	Subject
Client, Fake	2009/04/02	Action Plan Goal	ADAP/DAP - CL will have access to prescribed medications.
	2009/09/21	Action Plan Goal	Benefits - CL will obtain SC Medicaid benefits.
	2009/09/30	Action Plan Goal	ADAP/DAP - xxxxxxxx

- You can actually go to the goal/step in need of update/review from this screen. Double click task listed to make all changes needed to follow up and clear it out of the task list.

Closing out an Action Plan in Provide Enterprise:

- Action Plans, Goals, and Steps must be closed out for each client being discharged from services. Again, as the focus shifts to quality and evaluation, outcomes for Medical Case Management are increasingly critical. You are required to capture all Action Plan Goal Outcomes. For clients who remain in Medical Case Management Services year after year (continuing clients), it is strongly recommended that the Action Plan, Goals, and Steps be closed out on an annual basis, typically along with a client’s reassessment. Although, some goals for clients may not change from year to year, it is important that we are able to assess goal outcomes at least on an annual basis for our continuing clients; Action Plan and Action Plan Goal closures are the best way for to document re-evaluation of the plan.
- To close out an Action Plan, go to the active Action Plan under the client’s activity documents and place it in “edit” mode. Note: You must first close all open Action Plan goals. (See Section II above for instructions “Reviewing an Action Plan”)
- After closing all Action Plan Goals, add any Action Plan Notes, if needed. Then click the “✓Close Action Plan” button on the top of the document. The document will change and will look as pictured below. Enter the “Date Closed” and “Reason Closed”.

Provide Enterprise - [Action Plan For Fake Client]

File Find View Actions Tools Reports Windows Help

Close Close Action Plan New Action Plan Print

Action Plan : FakeClient (CF0101652)
Catawba Care Coalition - Client Services : Jennifer McDaniel/Catawba/SCGov [03/25/2009]

Summary | Notes

Action Plan Status	Closed
Assigned Case Manager	Jennifer McDaniel
Date Opened	03/25/2009
Date Completed	03/25/2009
Completed By	Jennifer McDaniel/Catawba/SCGov
Date Closed	* 04/01/2009
Reason Closed	CL discharged.
Last CM Review Date	04/01/2009
Last CM Reviewed By	Jennifer McDaniel/Catawba/SCGov

- Note: If you are closing a “Continuing” client, begin a “New Action Plan” by clicking the button at the top of the document.

Provide Enterprise - [Action Plan For Fake Client]

File Find View Actions Tools Reports Windows Help

Close Close Action Plan **New Action Plan** Print

Tools and Resources:

The following tools are available on the SC DHEC RW HOPWA Technical Assistance website:

<http://www.scdhec.gov/rwhopwata>

From the Funders:

- Ryan White Service Definitions (HRSA)
- Reports (HRSA, SC DHEC, HUD)
- SC CM Standards (SC DHEC)
- SC HOPWA Guidelines (SC DHEC)
- HOPWA Chart Review Tool (SC DHEC)
- SC DHEC Case Management Chart Review Tool (SC DHEC)

Intake/assessment

- SC Intake/Assessment Form
- SC Intake/Assessment Form + Instructions for PE

Progress Logs

- CM Progress Log Documentation for Provide Enterprise
- SC PE Progress Logs Training Overview

Referrals

- PE Referrals 101

Services Provided

- SC Statewide Master Service Glossary